Alma Fulfillment

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Introduction to Fulfillment

Fulfillment contains the following workflows/sections:

- **Circulation Desk Operations Workflow** – This is the workflow that governs the way the operations check-out/check-in actions flow at a circulation desk, from the creation of a request through its fulfillment. For a detailed explanation of the circulation desk operations workflow, see **Circulation Desk Operations** on page **11**.
- **Booking** – This is the workflow that governs the way Alma reserves resources for a patron that are to be used during a specified time frame. For a detailed explanation of the booking workflow, see **Booking** on page **65**.
- **Resource Requests Workflow** – This is the workflow that governs the way a general resource request utilizes internal staff operations. For a detailed explanation of the resource requests workflow, see **Resource Requests Workflow** on page **73**.
- **Resource Sharing** – This is the workflow that govern the way a resource sharing department manages both borrowing and lending requests to other institutions. For a detailed explanation of the resource sharing workflow, see **Resource Sharing** on page **117**.
- **Courses and Reading Lists Workflow** – This is the workflow that governs the way in which a reading list for a course is created and managed. For a detailed explanation of the courses and reading lists workflow, see **Courses and Reading Lists Workflow** on page **189**.
- **Advanced Tools** – This section describes managing fulfillment sets, changing loan dates in bulk import, viewing restore request and lost loan jobs, uploading offline loan and return transactions, configuring criteria for items requiring action, and transferring requests. For a detailed explanation, see **Advanced Tools** on page **211**.
- **Configuring Fulfillment** – This section describes fulfillment configuration activities. For a detailed explanation, see **Configuring Fulfillment** on page **231**.

2

Circulation Desk Operations

This section includes:

Circulation Desk Operations Workflow

The following is an illustration of the operations checkout/check-in actions flow at a circulation desk, from the creation of a request through its fulfillment.

NOTE:

Requests are created by staff or patron-driven from an external discovery system.

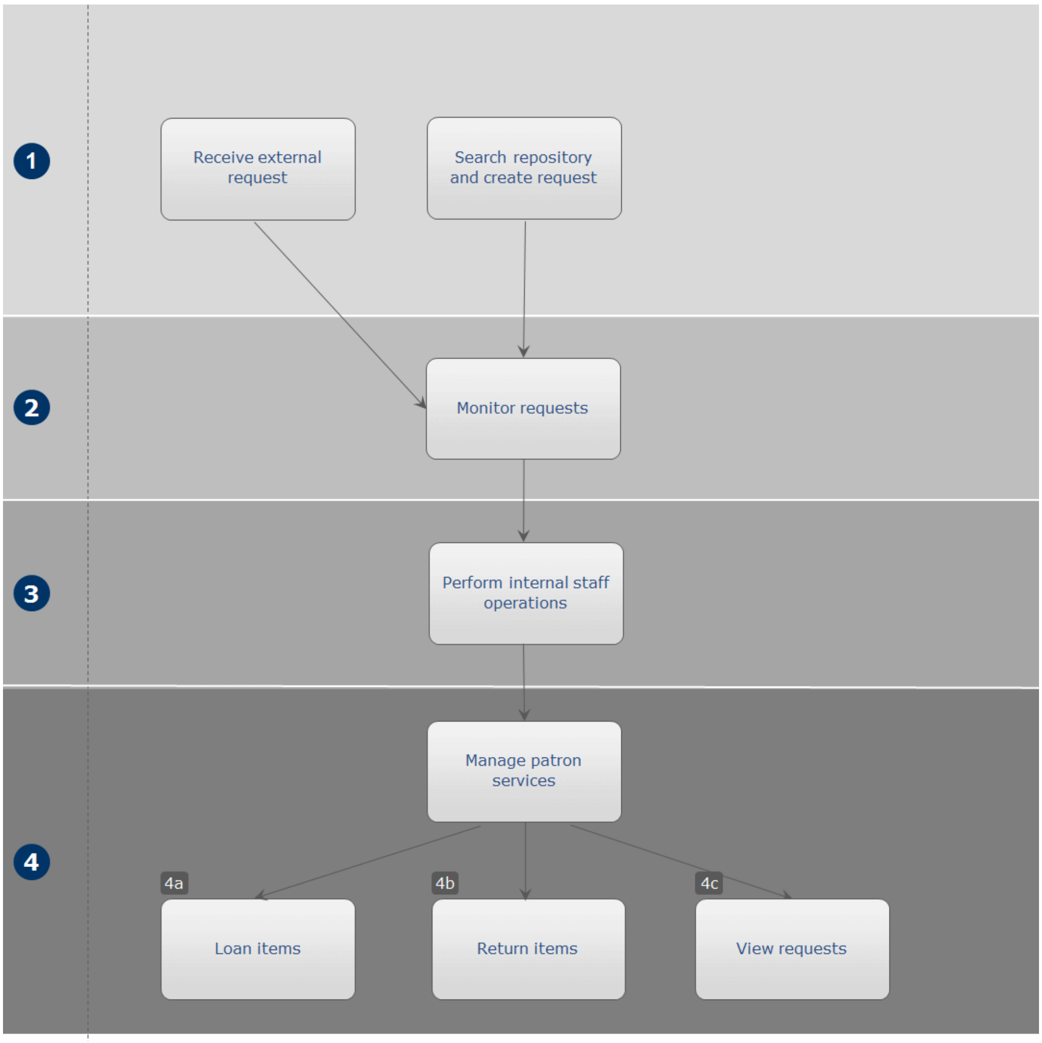

Figure 1: Circulation Desk Operations Workflow

The following is a detailed description of the steps within this workflow (with the numbers corresponding to the numbers in the diagram):

1 The workflow process begins when a request is created:

- The request can be created by an external discovery system and sent to Alma.
- The request can be initiated by the Fulfillment Services Operator, who searches for an item in the repository of the local institution (see **Searching the Repository** on page 14).

2 The Requests Operator views the requested item on the task list and prints a pickup slip (see **Monitor Requests and Work Orders** on page 76). Requested items can also be picked up from the library shelf (see **Pickup at Shelf** on page 81).

3 Internal staff perform operations according to the type of request (see **Resource Requests** or **Monitor Requests and Work Orders** on page **76**). If the requested item is sent to the Circulation Desk Operator/Manager, the workflow continues with step **4**. Otherwise, it follows the Resource Requests workflow (see **Resource Requests Workflow** on page **73**).

4 The Circulation Desk Operator/Manager manages the following patron services:

   a **Loans** - The Circulation Desk Operator/Manager loans the requested item to the patron from the hold shelf (see **To loan a requested item:** on page **44**).

   Alternatively, the Patron may retrieve the desired item directly from its permanent location (that is, without having ordered in advance), and arrive at the circulation desk with the material already in hand. The barcode is scanned at the circulation desk (see **To loan a requested item:** on page **44**).

NOTE:
For information on handling lost loans, see **Lost Loan Management** on page **51**.

   b **Returns** - The Patron returns the loaned item to the circulation desk. The barcode is scanned upon receipt of the item (see **Returning Items** on page **54**).

   c **View Requests** - The Circulation Desk Operator/Manager views a list of requested items (see **Requested Items** on page **63**).

Creating a Request from the Institution

A Circulation Desk Operator/Manager creates a request by searching the repository for titles or items (see **Searching the Repository** on page **14**), and then doing one of the following:

- Creating a request for a title
- Creating a request for an item

For details on creating a request for a title or item, see **Creating a Request** on page **16**.

You can also create a work order request, as needed (see **Creating a Work Order Request** on page **23**).

You can move requests from one circulation desk to another via the Transfer Requests option (see **Transfer Requests** on page **227**).

Searching the Repository

You first search the repository for a title or item to request. Any user can search the repository.

To search the repository:

1 On the Repository Search page (**Resource Management > Search and Sets > Repository Search**), select the **Institution** tab.

NOTE:
The **Community** tab is used for purchase requests only.

2 Search for a title or item in one of the following ways:

- In the **Repository Search** area, enter the requested search criteria (if you are a Circulation Desk Operator searching for an item to request, select either **All titles** or **Physical titles**) and click **Go**.
- Click **Advanced Search**. The Advanced Search page opens.

Figure 2: Advanced Search Page

On the Advanced Search page, do the following:

a In the **Find** drop-down list, select the criteria for which you are searching. (If you are a Circulation Desk Operator searching for an item to request, select either **All titles** or **Physical titles**.)

b Click **Add Conditions**. The Advanced Search – Add Conditions pop-up window opens.

Figure 3: Advanced Search - Add Conditions Pop-up Window

- Select search conditions and click **Add Conditions**. The Advanced Search page displays the conditions you added.
- Repeat this for as many conditions as you require. When you have finished, click **Go**.

The Repository Search page displays a list of titles/items that satisfy the search criteria. You can also search the repository from the Alma home page using the persistent search box. For instructions on using the persistent search box, see **Using the Persistent Search Box** on page **16** in the *Alma Resource Management Guide*.

The following figure shows an example of the search results.

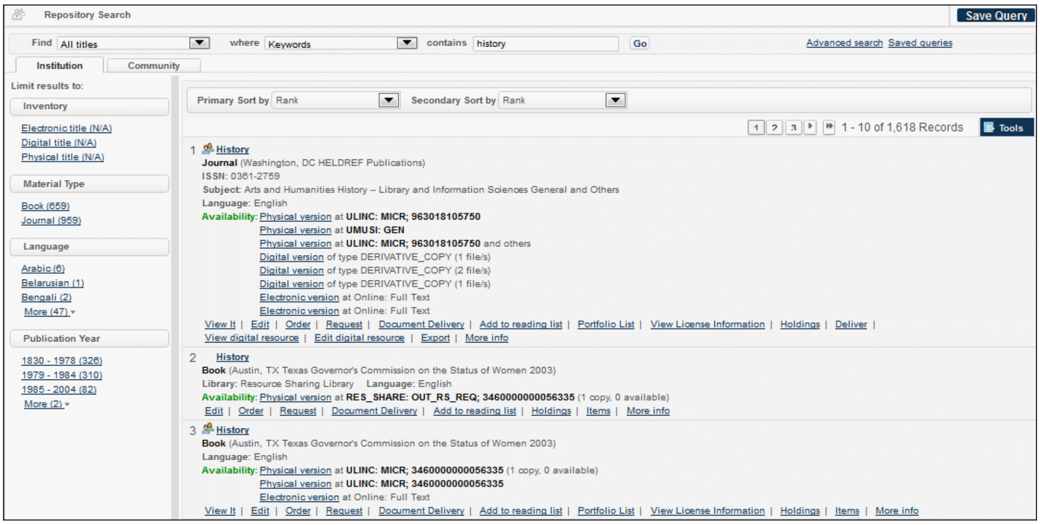

Figure 4: Repository Search Page

NOTE:
An item in a state of Hold Shelf Processing displays with **Process Type: Hold Shelf**.

Creating a Request

PERMISSIONS:

To create a request, you must have the following role:

- Fulfilment Services Operator

After locating a specific title or item in the institution's repository, you can create a request for it.

NOTE:
You can request an item that belongs to a bibliographic record for which an item is already on loan. To do so, ensure that the **enable_request_during_loan_for_different_policy** value is **true** in the Customer Parameters Mapping Table (see **Configuring Other Settings** on page **406**).

For item-level requests and title-level requests with only one item, Alma can be configured to mark the requested item as not available. The item being requested will be marked as **Item not Available** and will have a **Process** status of **Requested**. In such cases, if you release or cancel the request, the item's **Status** becomes **Item in Place**. To enable this functionality, contact Ex Libris Support.

A request can have one of the following statuses:

- **Ready**: The request is in a queue and is not activated. Indicates that currently there is no item available to fulfill the request.
- **Active**: The request is activated; there is an item available to fulfill the request.
- **Rejected**: The operator canceled an active request
- **Complete**: Indicates one of the following:
  - The request has been delivered to the patron
  - The request was canceled before it reached the hold shelf
- **Rejected by Library**: The request is canceled; the cancellation reason is: **Canceled at patron's request**.
- **Rejected by Patron**: The request is canceled; the cancellation reason is: **Patron no longer interested**.

Request statuses can also be viewed in Alma Analytics (see **Request Status** in the *Alma Analytics Guide*).

To create a request:

1 Click **Request** underneath a title/item on the Repository Search page (see **Searching the Repository** on page **14**). The Create Request page opens.

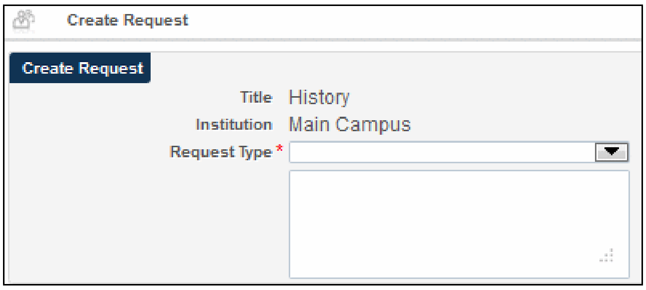

Figure 5: Create Request Page

2 From the **Request type** drop-down list, select the type of request.

- **Booking request**

  For details on creating a booking request, see **Creating Booking Requests** on page **68**.

- **Move permanently** or **Move temporarily**

  To permanently or temporarily change the location of a physical title or item, select **Move permanently** or **Move temporarily**. The **To** drop-down list displays, enabling you to select a library, as shown in **Figure 6**.

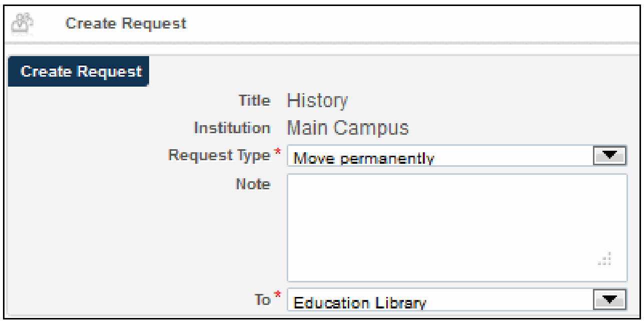

Figure 6: Request for Move Page

- **Patron digitization request**

  To create a digital copy (in full or in part) of a physical title or item, select **Patron digitization request**. The **Requester** and **Target**

destination drop-down lists display, enabling you to select a requester and digitization department, as shown in **Figure 7**.

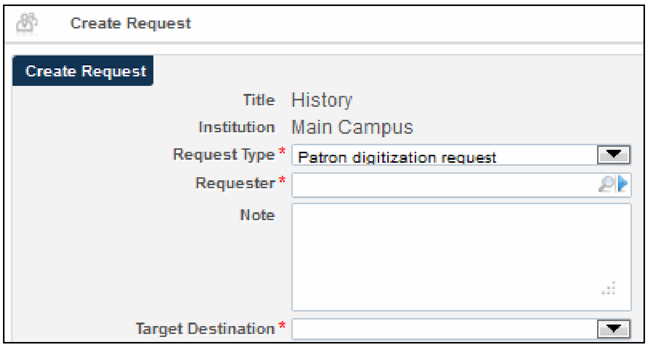

Figure 7: Request for Digitization

- **Patron physical item request**

  To create a request to loan a physical title or item to a patron, select **Patron physical item request**. The **Requester** and **Pickup at** drop-down lists display, enabling you to select a requester and destination for pickup, as shown in **Figure 8**.

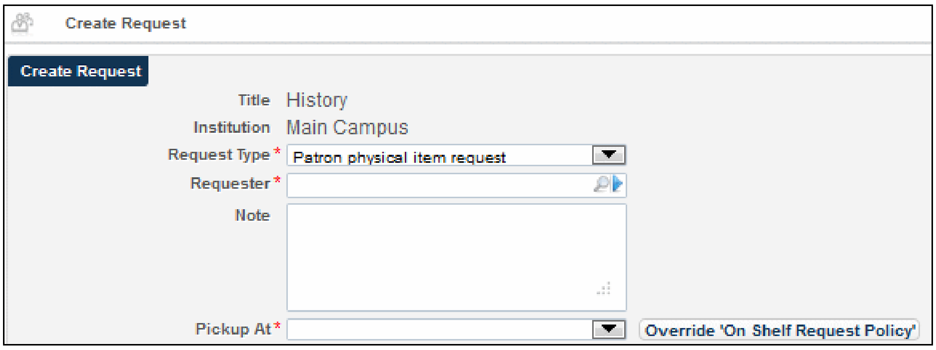

Figure 8: Request for Physical Item

NOTE:
The **Pickup at** field displays the locations specified in the Borrowing TOU by the Pick Up Location policy.

Click **Override 'On Shelf Request Policy'** to override the configured fulfillment policy that determines where you can pick up resources. This enables you to request any pickup location.

For title-level requests, Alma chooses an appropriate item based on the following criteria:

- All items must be available in the repository

  - When multiple items in the same location are located for a request, an item is chosen randomly
  - By default, a remote storage item receives the lowest priority to fulfill the request. In these cases, a request is registered on a remote storage item only if no other item is found.

    You can configure remote storage locations to take priority over non-remote storage locations by selecting the **Prefer over other locations** setting when configuring remote storage locations (see **Adding a Remote Storage Facility** on page **269**).
  - An item whose location is the same as the request's pickup location receives the highest priority to fulfill the request

  You can enable a physical item request to be delivered to a user's home or office. For details, see **Creating Personal Delivery Requests** on page **32**.

- **Staff Digitization Request**

  To create a digital copy (in full or in part) of a physical title or item for staff members with the Fulfillment Services Operator role, select **Staff digitization request**. The **Target destination** drop-down list displays, enabling you to select a digitization department that is to receive the digitization request, as shown in **Figure 9**.

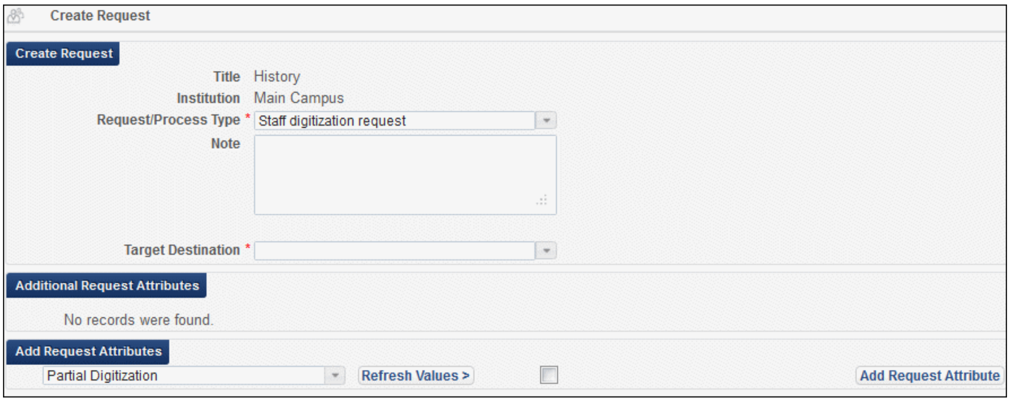

Figure 9: Staff Digitization Request

- **Restore**

  To reshelve an item that was temporarily moved to its original location, select **Restore**. An example of the resulting page is shown in **Figure 10**.

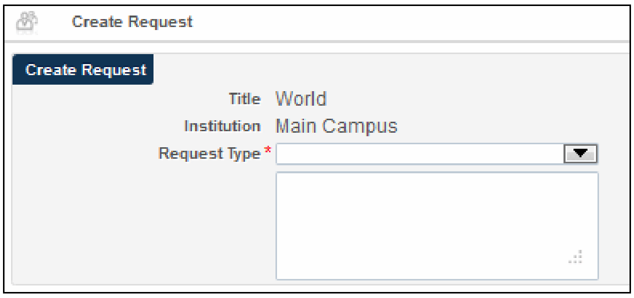

Figure 10: Request for Restore

- **General Hold Request**

  Displayed only when placing a request for a holding that contains no items. It is the only option in the drop-down list. For details on creating a general hold request, see **Creating a General Hold Request** on page **25**.

3 Enter the required information, as described in the following table. The table indicates which fields are displayed for which request types:

Table 1. Create Request Fields

Request Type	Field	Description
Patron digitization request Patron physical item request	Requester	Enter the name of the requester. You can enter part of a user’s identifier, such as a name or an email address, and click or . Select the required user from the resulting list. **NOTE:** Click to clear the selection.

Table 1. Create Request Fields

Request Type	Field	Description
<All>	Year	Year of the request
	Volume	Volume of the request
	Description	Description of the request. If there are no items that have a description, this field does not appear. The **All** option appears if there are items that do not contain a description. You can select **All** to select all items for the request, including those that do not have a description. **NOTE:** The **All** option appears only if there are both items with and without a description. **All** does not appear if all items have a description (that is, there are no items without a description), nor does it appear if you select a value for **Year** or **Volume**.
	Holding	Click or to select a holding from the Holdings List page.
	Manual description	Used when requesting an item that has not been cataloged into Alma. Ensure that the description you enter does not already exist for another item. For details on configuring a request for an item not cataloged in Alma, see **Creating a Non-Cataloged Item Request** on page 29.
	Note	Enter notes as needed.
Patron physical item request	Pickup at	Select a pickup location (from a list predefined by an administrator).

Table 1. Create Request Fields

Request Type	Field	Description
Move permanently Move temporarily	To	Select the specific library location (from a list predefined by an administrator) to which you want to move the title/item. When moving a title, all items associated with the title are moved.
Patron digitization request	Part to digitize	Displayed only when the Partial Digitization attribute is added and the **Refresh values** check box is selected, setting the attribute value to **True**.
Patron digitization request	Target destination	Select the digitization department from the drop-down list.

4 Add request attributes in the **Add Request Attributes** area.

a From the drop-down list, select an attribute and enter or choose a value for the attribute. Where relevant, select the check box to mark the attribute as **True**. Alma will then attempt to fulfill the request using any item that matches the selected attribute. For example, if a loan period attribute of **1 week loan** is selected, only one-week loans will be used by Alma to fulfill the request.

If you select **Date needed by**, click the calendar and select a date from the calendar pop-up window.

To remove an attribute value, click **Refresh Values**.

NOTE:
When creating a Patron digitization request and adding a Partial Digitization attribute, you can select the check box next to **Refresh Values** and click **Add Request Attribute** to add the Partial Digitization request attribute as **True**.

b Click **Add Request Attribute**.

The addional request attribute displays in the **Additional Request Attributes** area as shown in the following example.

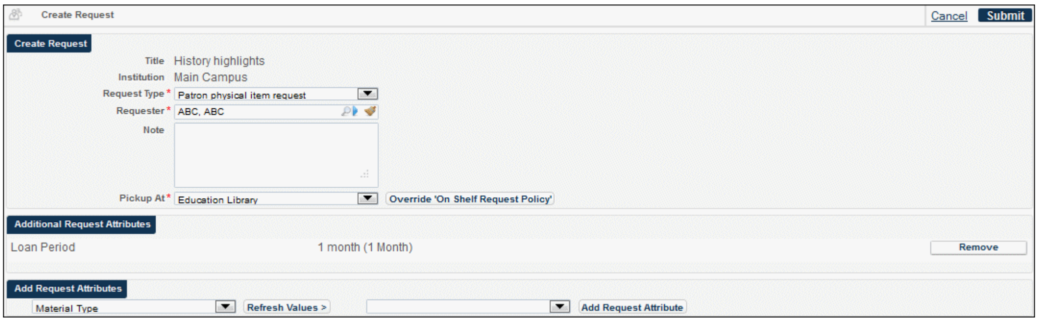

Figure 11: Additional Request Attributes

c Repeat this procedure for each attribute to be added to the request.

NOTE:

To remove an attribute, click **Remove** in the **Additional Request Attributes** area.

---

d Click **Submit**.

5 Click **Submit**. The request is created with a unique identification number.

After creating a request, the request is processed by Alma (see **Resource Requests** on page 73). A completed request displays on the Resource Request Monitoring page with the following information:

- **Workflow Step**: Pickup from shelf
- **Process Status**: New
- **Managed by Library**: <The library where the available inventory is located>
- **Managed by Desk**: <The circulation desk where the available inventory is located>

A patron receives notification that an item is ready for pickup from the hold shelf after the **Hold Shelf Processing** status is complete.

Creating a Work Order Request

PERMISSIONS:

To create a request, you must have the following role:

- Fulfilment Services Operator

A work order indicates that a process needs to be run on a physical item. Work order types are created on the Work Order Types page, accessible via the

General Configuration menu (see **Configuring Work Order Types** in the *Alma Administration Guide*).

You can monitor the progress of work orders on the Resource Request Monitoring page (**Fulfillment > Resource Requests > Monitor Requests & Item Processes**).

To create a work order request:

1. Click **Work Order** underneath an item displayed from a physical items search on the Repository Search page. The **Work Order** option displays only when searching the repository for physical items.

   The Create Work Order page opens.

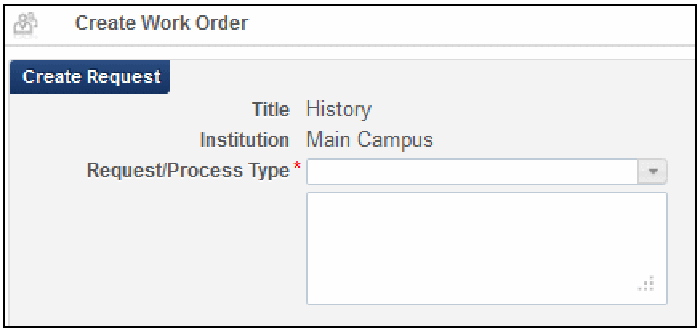

Figure 12: Create Work Order Page

2. In the **Request type** drop-down list, select a work order. An example of the resulting page is shown in **Figure 13**.

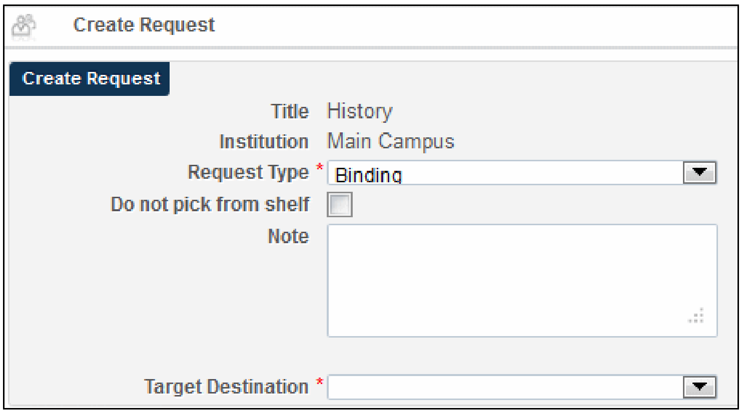

Figure 13: Create Request Page – After Work Order Selection

The displayed work orders are created on the Work Order Types page, accessible via the General Configuration menu (see **Configuring Work Order Types** in the *Alma Administration Guide*).

3 In the **Do not pick from shelf** field:

- If you want to create a work order for an item on the pickup shelf, do not select **Do not pick from shelf**.
- If you want to create a work order for an item which already exists at the circulation desk, select **Do not pick from shelf**. These items do not display on the Pick Up Requested Resources page (**Fulfillment > Resource Requests > Pick From Shelf**).

For an item that is in a process, the **Do not pick from shelf** setting is ignored – the system handles the item as it does a regular request, and the item is registered at the department to which it is returned.

4 Enter a note in the **Note** field, as needed.

5 Select a destination for the work order from the **Target destination** field. The options in this field are the departments associated with the selected work order type.

6 Click **Submit** to submit the work order.

You can also create a work order in one of the following ways:

- Scan an item's barcode on the Scan In Items page when scanning an item, and select **Actions > Work Order** to open the Create Request page. Follow step 2 through step 6 in the procedure above.
- Scan an item at a work order department (that is, when the **Currently at:** field at the top of the page displays a work order department). You then select the item's status in the **Set status to** field. For details on creating item statuses, see **Adding a Work Order Type Status** in the *Alma Administration Guide*.
- Select **Actions > Work Order** for an item on the List of Items page, which displays when clicking **Items** for a physical titles search result on the Repository Search page. For details on the List of Items page, see **Using the List of Items** in the *Alma Resource Management Guide*.

  For details on scanning items, see **Scanning Items** on page 84.

For an in-depth overview of work orders, see *Work Orders and Managing Physical Processes*. Note that you must be logged in to the Documentation Center to access this information.

Creating a General Hold Request

PERMISSIONS:

To create a general hold request, you must have the following role:

- Fulfilment Services Operator

A general hold request is created when you request a holding that has no items. When the item is added/inserted into Alma, it is placed on the hold shelf until it is picked up by the requesting patron.

To provide general hold requests to end users and customize the label on the Get It tab, perform the following configurations, respectively:

- Add rules for general hold requests on the Discovery Interface Display Logic page (**Fulfillment > Fulfillment Configuration > Discovery Interface Display Logic > Display Logic Rules**). For more information, see Configuring Display Logic Rules on page 380.
- Customize the label for the **c.uresolver.getit2.request.noItems** parameter on the Discovery Interface Labels Code Table page (**Fulfillment > Fulfillment Configuration > Discovery Interface Display Logic > Labels**). For more information, see Configuring Labels on page 387.

To create a general hold request:

1 On the Repository Search page (**Resource Management > Search and Sets > Repository Search**), perform a title search and locate a result that has a holding but no items.

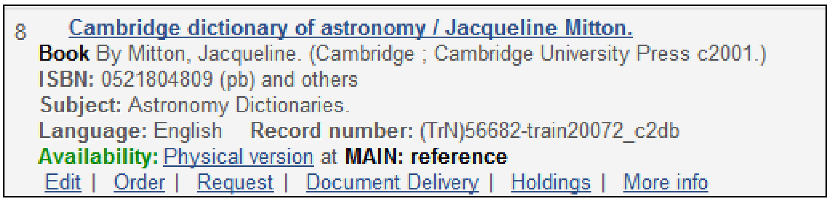

Figure 14: Repository Search Result – Holding Without Item

2 Click **Request**. The Create Request page opens.

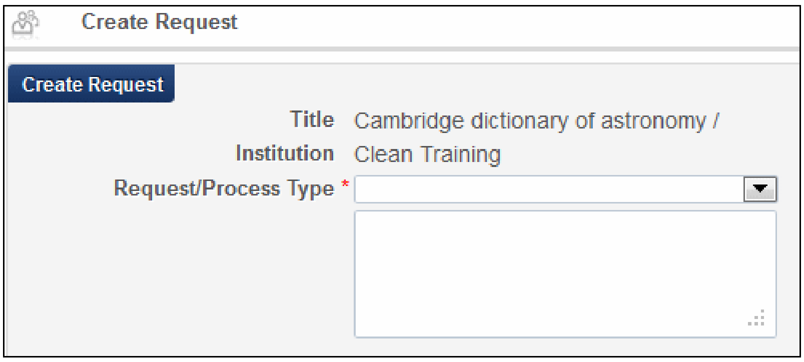

Figure 15: Create Request Page

3 In the **Request/Process Type** field, select **General hold request** (the only option available). The page refreshes.

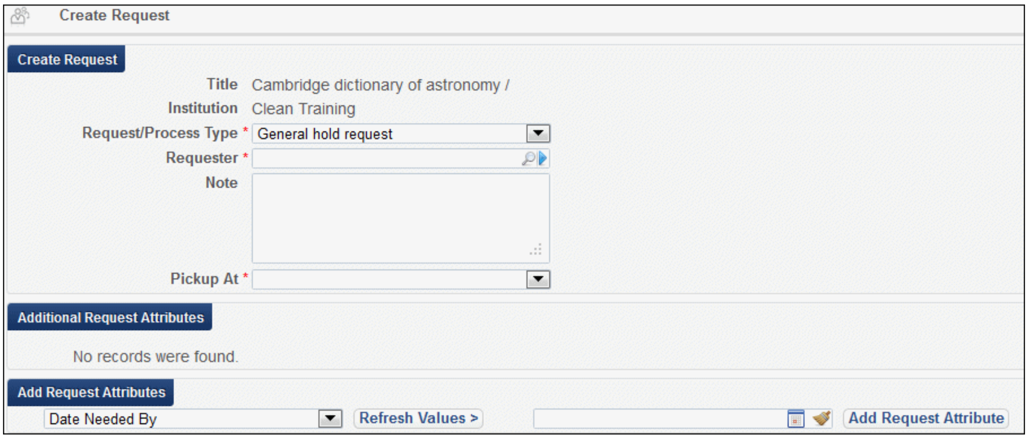

Figure 16: Create Request Page

4 In the **Requester** field, select the user that is requesting the item.

5 In the **Pickup at** field, select a location for the item to be picked up when it becomes available – this is the place where the Hold Request will be created.

6 In the **Add Request Attributes** section, select a date by which the item is needed and click **Add Request Attribute**. The value displays in the **Additional Request Attributes** section.

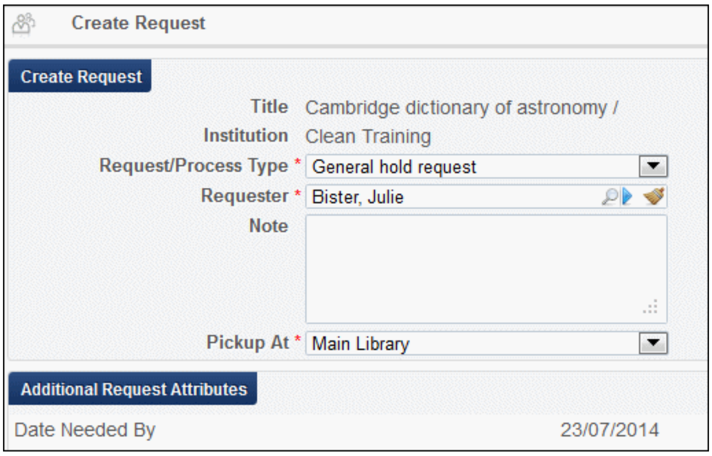

Figure 17: Create Request Page – Added Request Attribute

7 Click **Submit**. A confirmation message appears at the top of the page, indicating that the request was successfully submitted.

Figure 18: Repository Search Page – Successful Request Submission Message

8 On the Resource Request Monitoring page (**Fulfillment > Resource Requests > Monitor Requests & Item Processes**), search for the request using the request ID displayed with the confirmation message. The request displays with the following values:

- Workflow Step = Pickup From Shelf
- Request Type = General Hold Request

Figure 19: Resource Request Monitoring Page – General Hold Request

9 Ensure your location (that is, the value in the **Currently at:** field) is the library that is managing the hold request (specified in the **Managed by:** value on the Resource Request Monitoring page). Create an item and scan it into Alma, as follows:

a On the Scan In Items page (**Fulfillment > Resource Requests > Scan In Items**), enter a barcode in the **Scan item barcode** field and click **Create Item**. The Choose Holding Type dialog box opens.

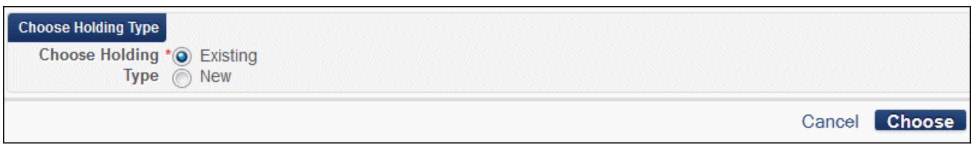

Figure 20: Choose Holding Type Dialog Box

b Select **Existing** and click **Choose**. The Quick Cataloging page opens, with the created barcode displaying in the **Barcode** field.

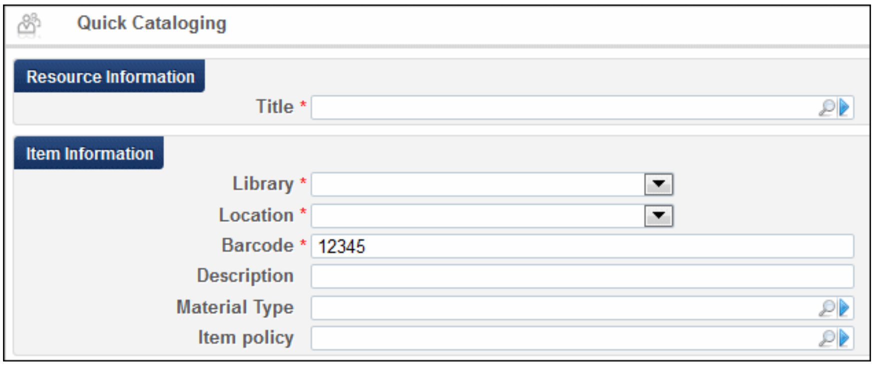

Figure 21: Quick Cataloging Page

c In the **Title** field, search for the title for which you created the General Hold Request.

The **Library** and **Location** fields are populated automatically with the library/location where the item is to be placed on the hold shelf.

d Click **Save**. The item is placed on the hold shelf of the specified library, and the item's **Destination** value on the Scan In Items page is **On Hold Shelf**.

Creating a Non-Cataloged Item Request

PERMISSIONS:

To create non-cataloged item requests, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

To scan an item and attach it to a request, you must have the following role:

- Requests Operator

When a serial item exists in a library but is not cataloged in Alma, you can attach the item to a request to be available to patrons.

To create a request for a non-cataloged item:

1. On the Repository Search page (**Resource Management > Search and Sets > Repository Search**), search for a physical title.
2. Click **Request** for the title. The Create Request page opens.
3. In the **Request/Process Type** field, select a request or process type other than **Booking**. The page refreshes.

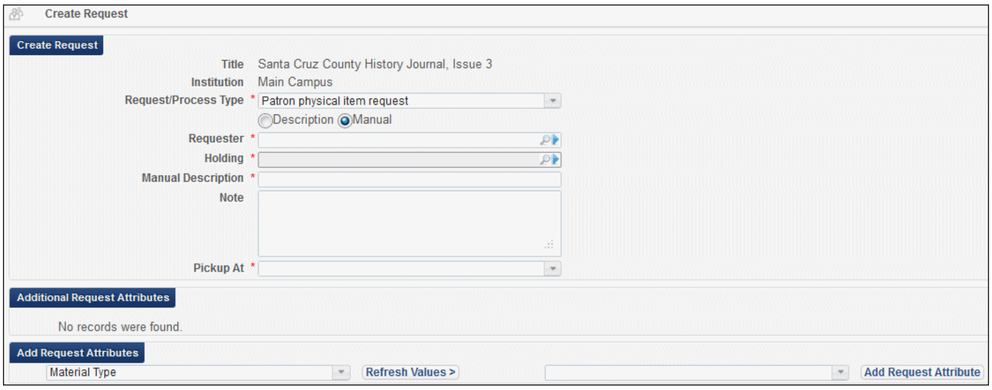

Figure 22: Create Request Page

4. Under the **Request/Process Type** field, select **Manual**.
5. In the **Requester** field, select a requesting patron.
6. In the **Holding** field, select a holding for the item.
7. In the **Manual Description** field, enter a description for the request. Ensure that the value you enter is not identical to the description of any existing items.

NOTE:
The **Manual Description** field is not displayed when a **Booking** request is selected.

8. Click **Submit**. A confirmation message displays on the Repository Search page.

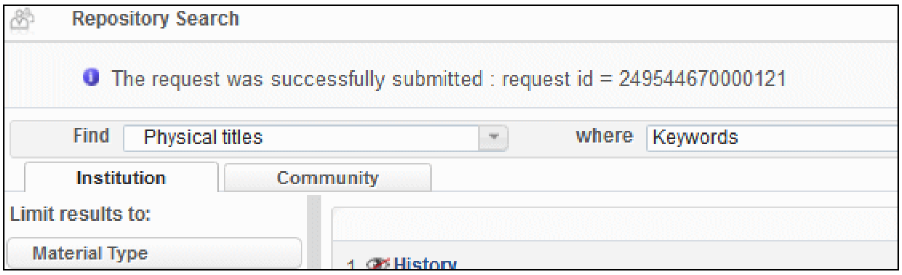

Figure 23: Confirmation Message

To create an item and attach it to a request:

1 On the Scan In Items Page (**Fulfillment > Resource Requests > Scan In Items**), click **Create Item** and select **Existing** in the resulting dialog box. The Quick Cataloging page opens.

2 In the **Title** field, browse for the relevant title. The **Library** and **Location** fields enable you to select the existing holdings of the title.

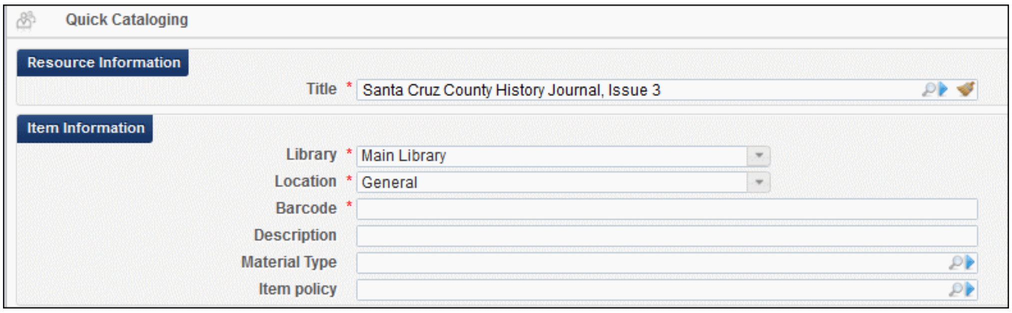

Figure 24: Quick Cataloging Page

3 In the **Barcode** field, enter a barcode for the item.

4 In the **Description** field, enter the value that you entered in the **Manual Description** field in step 7, above.

NOTE:
If you add a different value than the value of the **Manual Description** field, the title will still be attached to the request, as Alma can identify the title based on its other parameters.

5 Click **Save**. The item displays on the Scan In Items page with a message indicating that the item can be attached to a request.

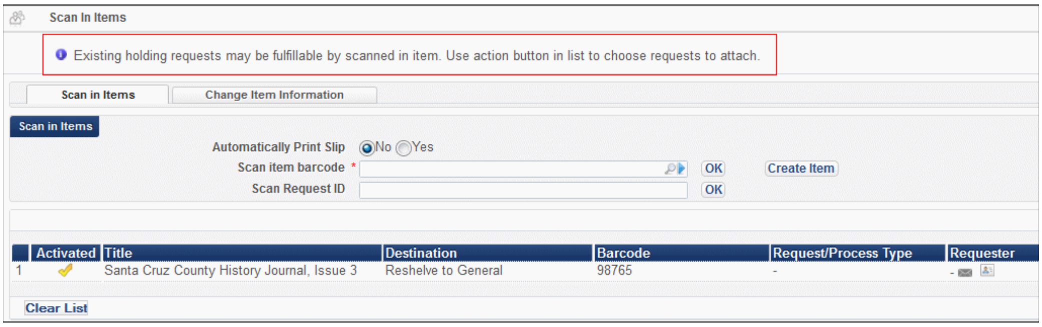

Figure 25: Scan In Items Page – Confirmation Message

6 Select **Actions > Attach to Request**. A dialog box opens, where you select the request's title to attach.

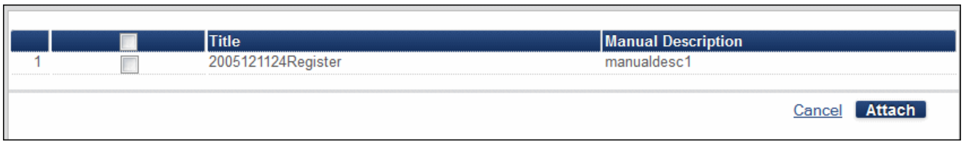

Figure 26: Attach Item Dialog Box

7 Select the check box for the title, and click **Attach**. The Scan In Items page displays the scanned item. The item's destination (for Patron physical item requests) is the request destination (the item's pickup location).

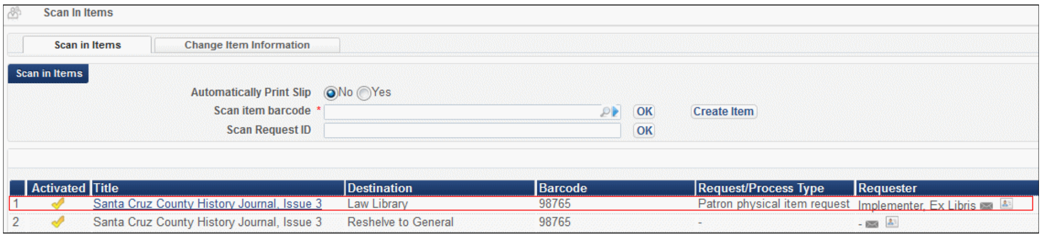

Figure 27: Scan In Items Page – Scanned Item

Creating Personal Delivery Requests

PERMISSIONS:

To create personal delivery requests, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Alma allows personal delivery of requested physical items to a user's home or office. If configured as described below, an item that is taken off a shelf to fulfill a personal delivery request is put in transit to a desk that is configured to support personal delivery. If the desk at which the item is scanned in does not support personal delivery, the item is transferred to a desk in the item's owning library that supports personal delivery. When scanned in at such a desk, the item is automatically checked out to the patron, and a Personal Delivery Notification email is sent to the patron.

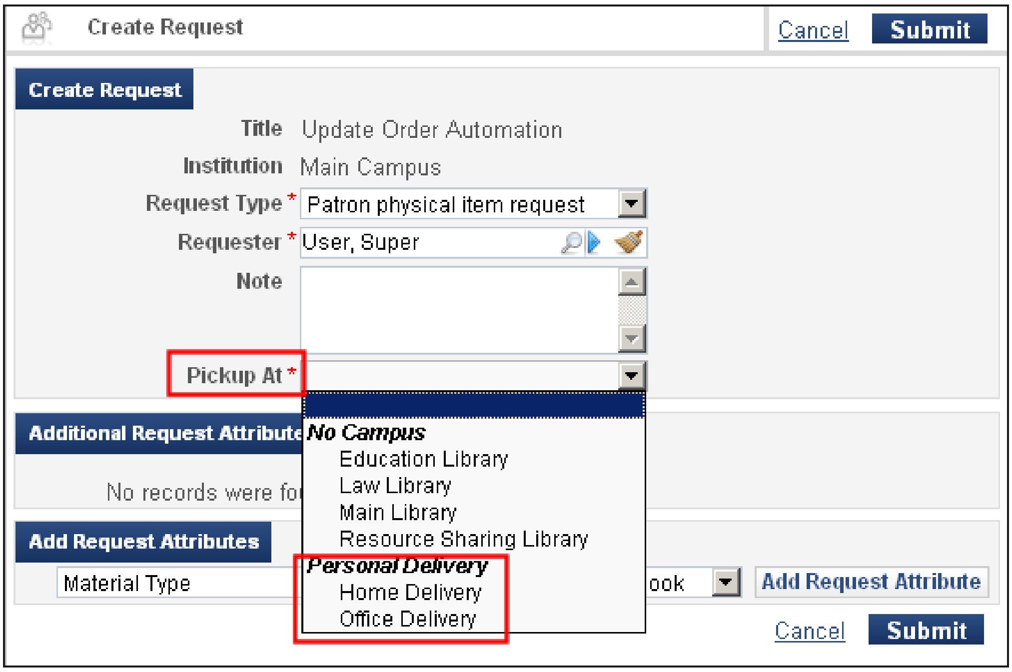

Figure 28: Personal Delivery Request - Create Request Page

For more information on requests, see **Creating a Request from the Institution** on page 13.

To enable and use this functionality, the following must be configured:

- The **Supports personal delivery** option must be configured at the circulation desk. For more information, see **Adding a Circulation Desk** on page 251.
- A **Personal delivery** request policy must be attached to the terms of use to allow personal delivery of items. In addition, you can configure a **Personal delivery fee** request policy to include delivery fees. For more information, see **Configuring Terms of Use** on page 293.
- There must be no patron blocks preventing home/office delivery. If patron blocks do exist, the item is sent to the hold shelf. If the blocks are removed, the patron can then receive the item from the hold shelf.

- Addresses with types **Home** and **Office** must be configured in the requesting user's User Details record. For more information, see **Editing Users** in the *Alma Administration Guide*.

VIDEO:

For more information about configuring home/office personal delivery, see the *Home and Office Delivery* video (7:52 mins).

Managing Patron Services

PERMISSIONS:

To manage patron services, you must have one of the following roles:

- Circulation Desk Manager (logged in to a circulation desk)
- Circulation Desk Operator (logged in to a circulation desk)

As part of the fulfillment process, the Circulation Desk Operator/Manager selects a patron (see **Selecting a Patron** on page **36**) and manages the patron's services. These activities include:

- **Viewing requests** – The Circulation Desk Operator/Manager can view a list of items requested by the patron (see **Requested Items** on page **63**).
- **Loans** – The patron arrives at the circulation desk to receive the requested material which is currently on the active hold shelf.

  Alternatively, the patron may bring the desired item directly from its permanent location (that is, without having ordered in advance) to the circulation desk. The barcode is scanned at the circulation desk (see **Loaning Items** on page **43**).
- **Returns** – The patron returns the loaned item. The barcode is scanned at the circulation desk (see **Returning Items** on page **54**). The item is displayed in the **Returns** table.
- **Fees and fines** – Fees may be charged for library services (such as digitization), or fines may be levied if, for example, a patron damages a book. The Circulation Desk Operator/Manager can view a patron's fines/fees and receive payments from a patron if the circulation desk is configured to receive payments (see **Viewing Fines and Fees and Receiving Payments** on page **57**).
- **Editing patron information** – The Circulation Desk Operator/Manager can make changes to patron information (see **Editing Patron Information** on page **42**).

You can create relationships between libraries to enable the libraries to check in and check out items for each other (see **Configuring Fulfillment Relationships** in the *Alma Fulfillment Guide*).

The Patron Services page allows circulation desk operators and managers to manage patron services.

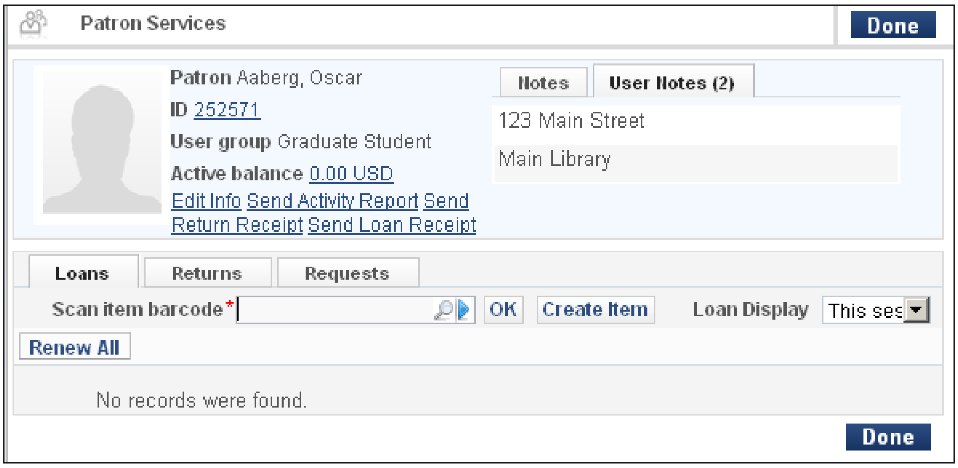

Figure 29: Patron Services Page – Loans Tab

The Patron Services page displays the following core patron information:

- Patron name
- ID
- User group
- Active balance (of the patron's fines/fees)
- Notes:
  - Number of items on the On Hold Shelf
  - Overdue items

NOTE:
The User Notes tab displays user notes in an arbitrary order that cannot be configured.

The following keyboard shortcuts are available on the Patron Services page:

- **Alt + 1** – Opens the **Loans** tab
- **Alt + 2** – Opens the **Returns** tab
- **Alt + 3** – Opens the **Requests** tab

- **Ctrl + Alt + D** – Same as clicking **Done**; returns to the Patron Identification page to enable searching for another patron (see **Selecting a Patron** on page **36**)

You can do the following on the Patron Services page:

- Click **Renew All** to renew all items that the patron currently has on loan. The system displays an informational message and sends a borrowing report with the updated due dates, where relevant.
- Click **Edit Info** to open the Quick User Management page and edit the patron's information. For details on the fields displayed on this page, see **Table 2** in the *User Management* chapter of the *Alma Administration Guide*.
- Click **Send Activity Report** to send a report of the patron's activities to the patron.
- Click **Send Return Receipt** to send a return receipt to the specified patron for items returned to the circulation desk. For details on configuring the sending of receipts automatically, see the relevant field descriptions in **Table 24** in **Configuring Circulation Desks** on page **249**. For details on customizing the letter that accompanies the return receipt, see **Configuring Alma Letters** in the *Alma Administration Guide*.
- Click **Send Loan Receipt** to send a loan receipt to the specified patron for items borrowed at the circulation desk. For details on configuring the sending of receipts automatically, see the relevant field descriptions in **Table 24** in **Configuring Circulation Desks** on page **249**. For details on customizing the letter that accompanies the loan receipt, see **Configuring Alma Letters** in the *Alma Administration Guide*.
- Click the **Loans** tab to view the patron loaned items. For details, see **Loaning Items** on page **43**.
- Click the **Returns** tab to view the patron returned items. For details, see **Returning Items** on page **54**.
- Click the **Requests** tab to view the patron's requested items. The patron's requests are displayed. For details, see **Requested Items** on page **63**.

NOTE:

The Patron Services page is set to time out after two minutes of inactivity. This timeout period is not configurable.

Selecting a Patron

Before you can provide services to a patron, you must search for the patron's information at your local institution.

If your institution belongs to a fulfillment network, you may need to search for the patron's information at the patron's home institution and then register the patron at your local institution (see **Registering Patrons** on page **37**).

Beside patron selection, the Patron Identification page displays the following buttons:

- **Go To Return Items** – Enables returning patron items (see **To return items in bulk:** on page 55).

  You can also press **Ctrl + Alt + R** on your keyboard to enable returning patron items via the Manage Items Returns page.

- **Register New User** – Enables register patrons (see **Registering Patrons** on page 37).

Figure 30: Patron Identification Page

To select a patron whose services you want to manage:

On the Patron Identification page (**Fulfillment > Checkout/Check-in** > **Manage Patron Services**), enter a patron's name in the **Scan patron's ID or search for patron** field, using one of the following methods:

- Enter part of a user's identifier, such as a name or an email address, and click . A list of users with the identifier displays. Select the required user from the list, and click **Go**.

- Click . The Find and Manage Users page opens. Select the required user, and click **Go**.

  The Loans tab on the Patron Services page opens. For details on patron loans, see **Loaning Items** on page 43.

Registering Patrons

Before you can provide services to a patron, the patron must be registered at your institution. In addition, if your institution belongs to a fulfillment network, you may need to search for a patron's information at another institution to retrieve the patron's information from the patron's home institution.

When a user from one institution borrows or places requests at another institution, the user's home institution contact information is refreshed at the servicing institution.

VIDEO:

Learn about how Alma creates a linked user in a non-home institution when a user in a fulfillment network requests an item from that institution using their home institution's Primo in the *Request from a Member Institution* video (5:59 mins).

To register a new patron:

1. On the Patron Identification page (**Fulfillment > Checkout/ Checkin > Manage Patron Services**), click **Register New User**. The Quick User Management page opens.

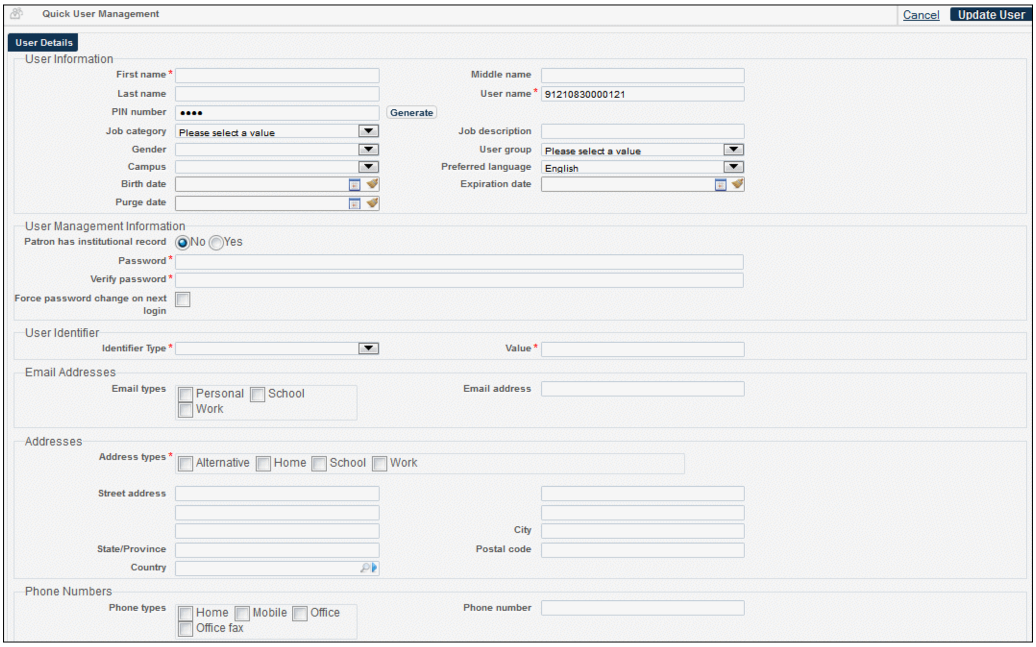

Figure 31: Quick User Management Page

2. Enter information in the displayed fields. Non self-explanatory fields are explained in the following table.

Table 2. Quick User Management Fields

Section	Field	Description
User Information	Purge date	The date on which the user is purged from the system. Click the **Purge date** box and select the required date from the Calendar dialog box.
	Expiration date	The estimated date when the user is expected to leave the institution. The user is then blocked from fulfilment activities, but is still registered in the system. Click the **Expiration date** box and select the required date from the **Calendar** dialog box.

Table 2. Quick User Management Fields

Section	Field	Description
User Management Information	Patron has institutional record	Indicates whether the patron being registered is to be an external or internal user. Possible values are: ■ **Yes** – The patron is created externally and information for the patron is updated via the SIS synchronization process. ■ **No** – The patron is created internally. If you select **Yes**, the **Owning system** field is displayed. The options that appear in this drop-down list are the names of the SIS profiles that were previously defined (see **Student Information Systems** in the *Alma Integrations with External Systems Guide*). **NOTE:** New users should generally be added to Alma from an external system maintained by the institution. Only in exceptional cases, for guests in the library, should users be added as internal users in Alma. For an in-depth explanation of user management in Alma and an explanation of the additional fields that are displayed if you select **Yes** in this section, see **Overview of User Management in Alma** in the *Alma Administration Guide*.

3 Click **Update User** to save the patron's details. The Patron Services page opens, where you can manage the patron's services.

To register a walk-in patron who belongs to another institution in the Fulfillment Network:

1 On the Patron Identification page (**Fulfillment > Checkout/Check-in > Manage Patron Services**), use the patron's local ID to identify the walk-in patron, just as local patrons are identified at the desk.

Figure 32: Search for Patron in Local Institution

If the patron's ID is found, you can proceed with the loan on the Patron Services page. Otherwise, continue to the next step to register the patron with this institution.

2 If the patron's ID is not found at this institution, search for the ID at the patron's home institution:

a Select **Find user in other institution** to open the Fulfillment Network search fields.

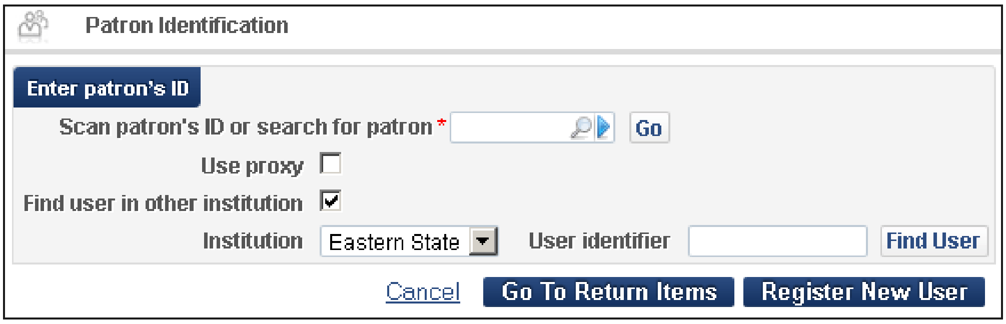

Figure 33: Search for Patron at Another Institution

b Select the patron's home institution from the **Institution** drop-down list.

c Scan or type the patron's primary ID in the **User identifier** field.

d Click **Find User**.

e The Quick User Management page opens and displays the patron's contact information, which was retrieved from the patron's home institution.

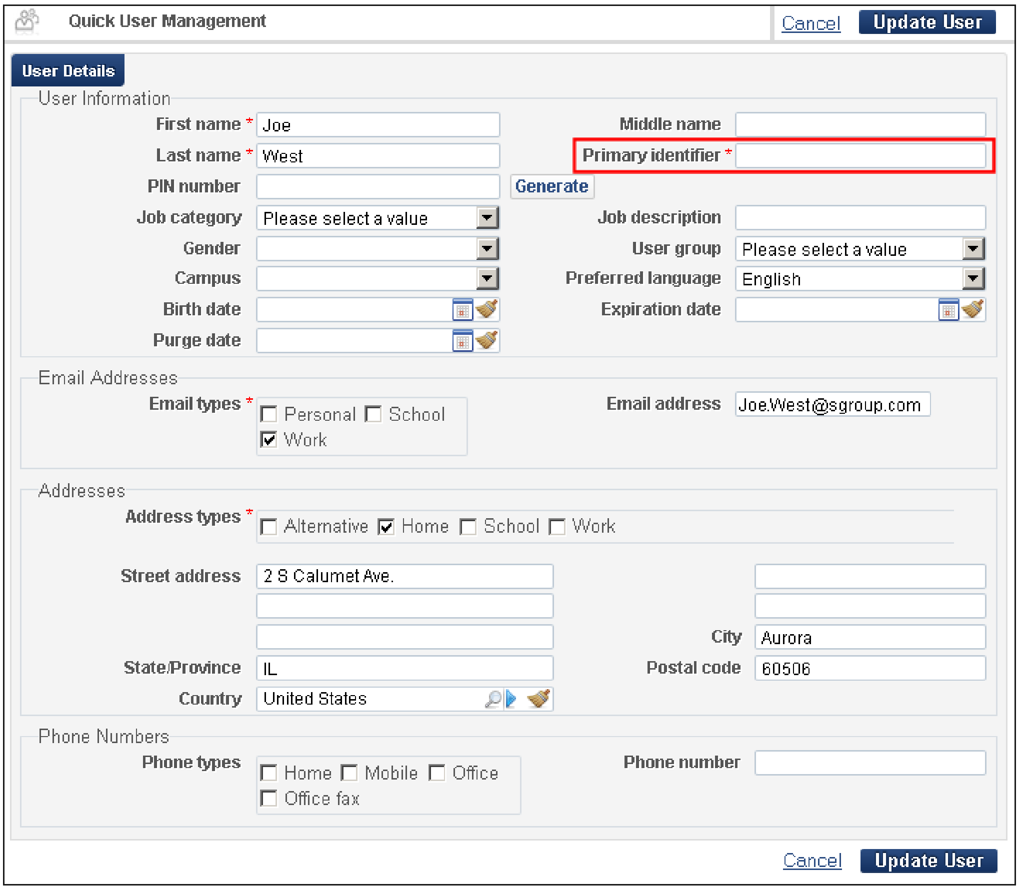

Figure 34: Register a Patron from Another Institution

3 Enter the patron’s ID in the **Primary identifier** field.

4 Specify any additional fields.

5 Click **Update User** to create the register the patron for your local institution.

The Patron Services page opens, allowing you to manage patron services.

Editing Patron Information

The Quick User Management page allows you to create and modify a patron’s account and contact information.

To edit patron information:

1 On the Patron Identification page, select the patron account that you want to modify (see **Selecting a Patron** on page 36).

The Patron Services page opens.

2 On the Patron Services page, click the **Edit info** link.

The Quick User Management page opens.

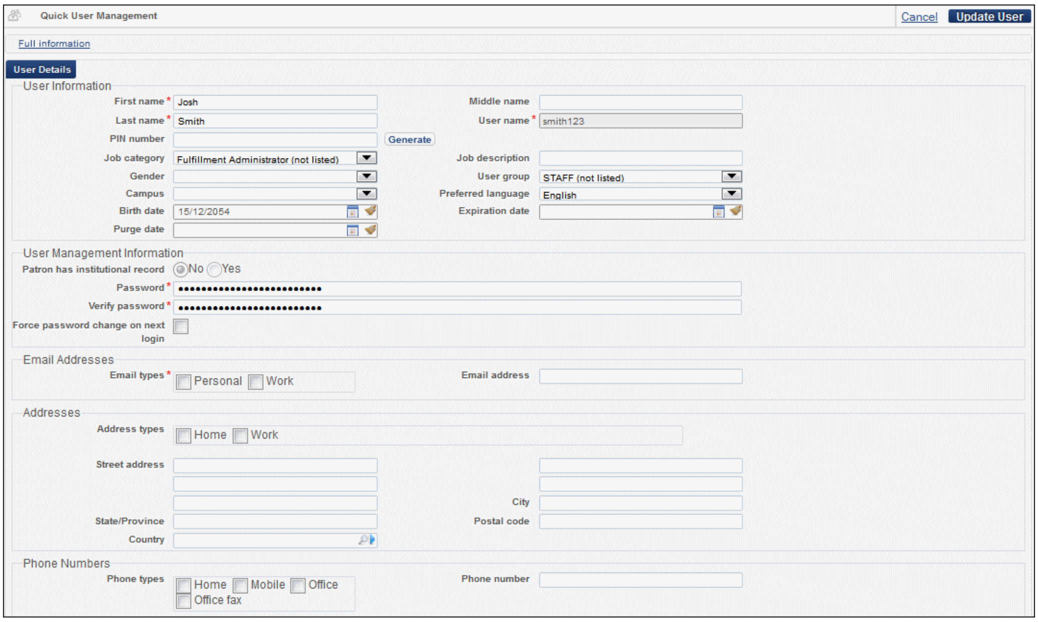

Figure 35: Quick User Management Page

3 Do one of the following:

- Modify the information on the page and click **Update User**.
- Click the **Full Information** link at the top of the page to open the User Details page with all tabs of the user's information.

NOTE:
For information on these fields, see **Table 2** of the **Adding Users** section in the *Alma Administration Guide*.

Click **Save**. The changes are saved and the Patron Services page opens.

Loaning Items

Items are loaned as part of the circulation desk workflow (see **Circulation Desk Operations Workflow** on page 12), or the patron can bring the item directly from its permanent location to the circulation desk to be loaned.

When loaning an item that does not currently exist in the repository, you can create a new item to be entered into the repository by clicking the **Create Item** button (see **To create a new item to be entered into the repository:** on page 47).

You can create relationships between libraries to enable a library to loan items for another library (see **Configuring Fulfillment Relationships** in the *Alma Fulfillment Guide*).

For information on handling lost loans, see **Lost Loan Management** on page **51**.

To loan a requested item:

1. On the Patron Services page (see **To select a patron whose services you want to manage:** on page **37**), click the **Loans** tab. In the **Scan item barcode** field, scan in or manually type the barcode of the requested item. You may search for an item by typing its title or using the icon. The Repository Search page opens, displaying the search matches.

NOTE:

If you manually enter a barcode that does not exist, a dialog box is displayed indicating that the item was not found. You can click the **Create Item** button in the dialog box to create an item with the barcode. For details, on creating a new item, see **To create a new item to be entered into the repository:** on page **47**.

2. Choose an item and click **Select**. The item's barcode is displayed in the **Scan item barcode** field.
3. Click **Go**. The item details are displayed in the Patron Services Loans tab.

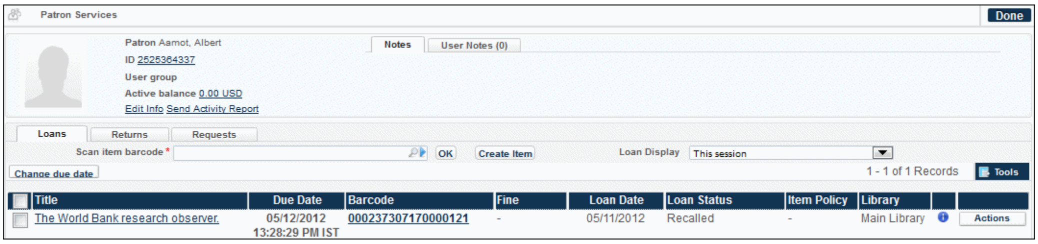

Figure 36: Patron Services Loans Tab

The **Due Date** value indicates the item's due date at the time of receiving the item, minus the configured Delivery Delay value on the Resource Sharing Partner page (see **Resource Sharing Requests** in the *Alma Integrations with External Systems Guide*).

For example, if the due date when receiving the item is May 16, 2012 and **Delivery Delay = 4**, The **Due Date** value displays as May 12, 2012, to allow 4 days for item delivery and ensure that the item arrives by its 'actual' due date of May 16.

When a loan's due date is after the patron's expiration date as defined in the patron's user details, the loan is shortened and the due date is calculated as the closing hour of the library on the day the patron's record expires. If the library is closed on that date, the Closed Library Due Date Management Policy is invoked (see the **Closed Library Due Date Management Policy** entry in **Table 26**).

However, if you manually change the due date for an existing loan (even to a time after the patron expiry date), no system checks are run and the system permits the new due date (see step **5** in **To change the loan due date when requested by a patron:** on page **47**).

4 From the **Loan display** drop-down list, select one of the following:

- **All** – displays all items that have been loaned to the patron
- **This session** – displays items that have been loaned during the current session

---

NOTE:

By default, the system displays items that have been loaned during the current session. To change the default display to all loans, set the **remember_last_loan_display** parameter (**Fulfillment > Fulfillment Configuration > Configuration Menu > General > Other Settings**) to **true**.

NOTES:

A circulation desk role's capability to view all of a patron's loan/return history is set/determined by regional preferences as follows:

- North America – Disabled
- Europe/Asia Pacific – Enabled

If you are in the process of implementing your Alma system, work with your Ex Libris Professional Services contact to customize these options for your specific institution.

If you are currently in production/support and need to have your settings configured differently, contact Ex Libris Support for assistance.

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5 For the relevant loan, select from the following options in the **Actions** menu:

- **Work order** – Creates a request; you can select a work order or other request. See step **2** in **To create a request:** on page **17**.
- **Delete loan** – Deletes the item from the Loans tab.
- **Change due date** – The loaned item's due date can be changed at or after the loan time (see **To change the loan due date when requested by a patron:** on page **47**).

NOTE:
If a calendar is not defined for the specified library, the due date cannot be changed for the loan.

- **View notes** – View notes on the loan (see **To view loan notes:** on page **49**).
- **View queue** – Enables you to view other hold requests that have been placed on the item.
- **View policies** – Opens the Fulfillment Configuration Utility page, which enables you to view policies that would take effect for the item if it were loaned to the indicated patron. Displayed information includes the Fulfillment Unit Name, Fulfillment Unit Rule, and TOU associated with the item, as well as the due date and overdue fine information. For details, see **Viewing Fulfillment Configuration Information** on page **211**.
- **Loan history** – View a history of the loan (see **To view loan notes:** on page **49**).
- **Renew** – Renew an item (the **Loan Status** field value is updated to **Renewed**).

NOTES:

- When a loan renews to the current time, it means that the renewal due date calculated by the system is in the past. This occurs if the user is expired or if the due date policy is a fixed date in the past.
- If **Patron Renewal** is added to a Resource Sharing Workflow Profile of **Type = Lending**, the patron can request renewals from the Primo loan list. Renewal is possible only if allowed by the loan's terms of use, as it is for non-resource sharing related loans.

- **Claimed Return** – Claim an item as returned (see **To claim an item was returned:** on page **49**).
- **Lost** – Specifies that an item is lost and charges the patron (see **To indicate a lost item:** on page **48**). Ensure that the value of the Loan Display drop-down list is **All**. Click **OK** to add the details of the loan to both the Loan Status column of the Patron Services page and to the Fines/Fees tab of the User Details page (see **Editing Users** in the *Alma Administration Guide*).

6 Click **Done**.

To create a new item to be entered into the repository:

1 On the Patron Services page (see To select a patron whose services you want to manage: on page 37), click the **Loans** tab.

2 Click **Create Item**. The Choose Holding Type dialog box opens.

3 Choose the holding type and, where relevant, the citation type, and click **Choose**. The Quick Cataloging page opens.

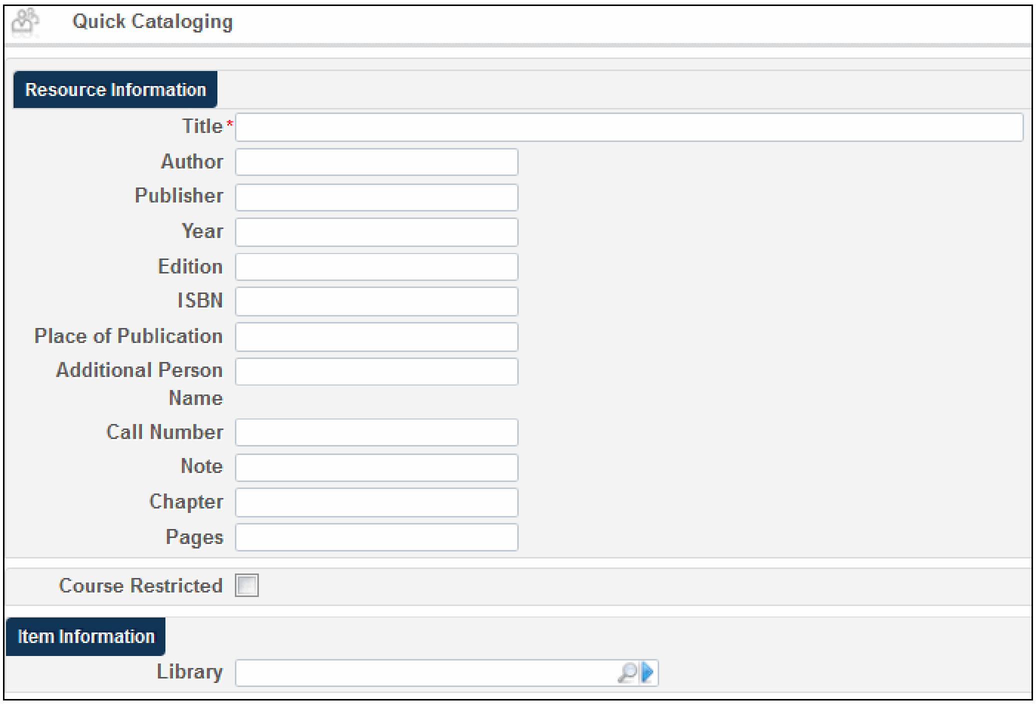


Figure 37: Quick Cataloging Page

4 Configure resource and item information and click **Save**. A new item is created and entered into the repository. It can then be searched for in the **Scan item barcode** field in the Loans tab.

To change the loan due date when requested by a patron:

1 On the Patron Services page (see To select a patron whose services you want to manage: on page 37), click the **Loans** tab.

2 Select the loan whose due date you want to change and click **Change Due Date**.

The Select Due Date dialog box opens.

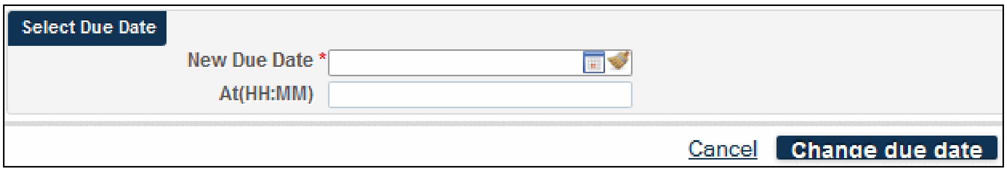


Figure 38: Select Due Date Dialog Box

3 Click the **New due date** box and select the due date from the **Calendar** dialog box.

4 Optionally, select the time due in the **At** field.

When the time is not specified, the system uses the closing time of the new due date. If the library is closed on that date, the Closed Library Due Date Management Policy is invoked (see the **Closed Library Due Date Management Policy** entry in **Table 26**.)

5 Click **Change Due Date**. The new date is saved in the **Loans** tab.

An email with the new due date is sent to the patron and saved as an attachment to the user record.

NOTES:

- The **Change Due Date** action is used as a technical change and is not subject to TOU policies or other checks.

  For example, if a patron's expiration date is June 7 and the New Due Date value is June 10, the loan's due date is updated to June 10, even though the patron's record expires on June 7.

- A Fulfillment Administrator can change the due dates of all loans that are planned for a specific date as a bulk action, such as when the library wants to close on a specific date for some unplanned maintenance work. The system automatically corrects due dates that occur when the library is closed, depending on the library's predefined policies.

To indicate a lost item:

1 On the Patron Services page (see **To select a patron whose services you want to manage:** on page 37), click the **Loans** tab.

2 In the **Loan display** drop-down list, select **All** and then select the item that is lost.

3 For the lost item, select **Actions** > **Lost**. The Lost Item dialog box opens with the fine/fee information.

4 Click **OK**. The details of the loan are added to the **Loan Status** column of the Patron Services page, and to the **Fines/Fees** tab of the User Details page (see **Editing Users** in the *Alma Administration Guide*).

To claim an item was returned:

1. On the Patron Services page (see **To select a patron whose services you want to manage:** on page 37), click the **Loans** tab.
2. In the **Loan display** drop-down list, select **All** and then select the item that is claimed to have been returned.
3. Select **Actions > Claimed return**. The value of the **Loan Status** column changes to **Claimed returned**.

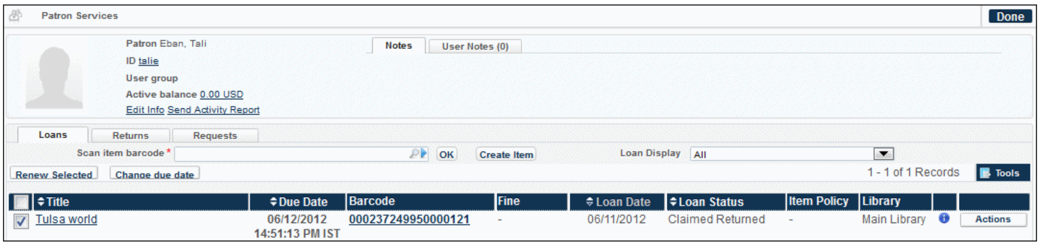


Figure 39: Claimed Returned Status on Patron Services Page

To view loan notes:

1. On the Patron Services page (see **To select a patron whose services you want to manage:** on page 37), click the **Loans** tab, and select an item.
2. In the **Loan display** drop-down list, select **All** and then select the item that is claimed to have been returned.
3. Select **Actions** > **View notes**. The Loan Notes page opens.

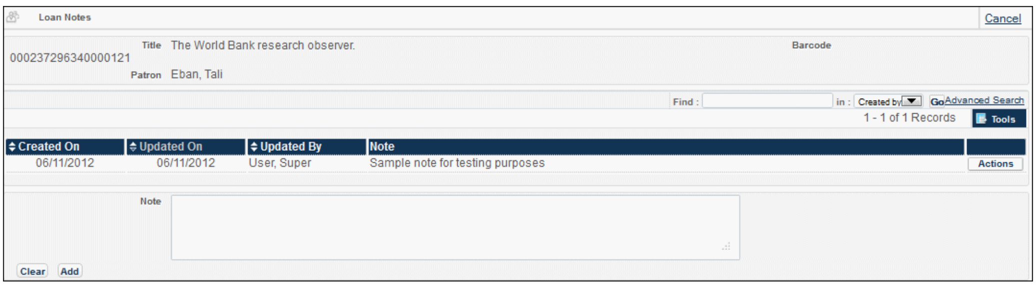


Figure 40: Loan Notes Page

Viewing Loan History

You can view a loan's history on the Loan Audit Trail page.

To view loan history:

1. On the Patron Services page (see **To select a patron whose services you want to manage:** on page 37), click the **Loans** tab.
2. In the **Loan display** drop-down list, select **All**.
3. Select **Actions** > **Loan history** for an item. The Loan Audit Trail page opens, displaying the actions taken on the specified item.

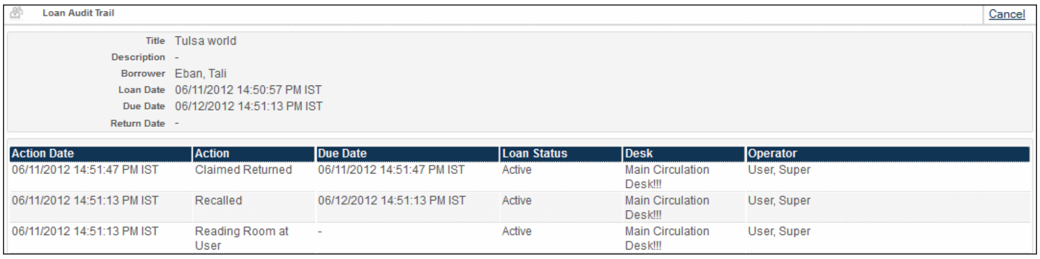


Figure 41: Loan Audit Trail Page

The available actions (displayed in the **Action** column) are displayed in the following table:

Table 3. Action Column Values

Action	Description
Normal	Indicates that the item was checked out. This is an item's initial status.
Recalled	The item was recalled by the library
Renewed	The item was renewed by the patron
Lost	The item has been declared lost, based on the configured lost loan profiles (see **Configuring Overdue and Lost Loan Profiles** on page 311)
Lost with overdue charge	An overdue fine was incurred when the item was declared lost
Claim returned	The user claims to have returned the item
Claim returned with overdue charge	An overdue fine was incurred when the item was claimed returned
Reading room with user	The resource is in the library, in use by a user (patron)
Reading room on shelf	The resource in the library, on the shelf but reserved for a user (patron)
Web change forward	The loan's due date has been moved forward

Table 3. Action Column Values

Action	Description
Web change backward	The loan's due date has been moved backward
Bulk change forward	The loan's due date has been moved forward by a process
Bulk change backward	The loan's due date has been moved backward by a process
Automatic renewed	The loan was renewed by an automatic renewal job
Undo return	The SIP2 machine cancels the **Check in** message
Undo renew	The SIP2 machine cancels the **Renew** message
Item was found	An item declared **Lost** or **Claimed returned** has been found
Item was returned	The item was returned to the library
Loan	The loan was initiated for the item

Lost Loan Management

Overdue items can be marked as lost by the Circulation Desk Operator in one of the following ways:

- When a patron notifies the circulation desk that the item is lost
- By configuring the number of days after which an overdue item's status is automatically changed to **lost**

The following is an illustration of the actions that can be performed on lost loans.

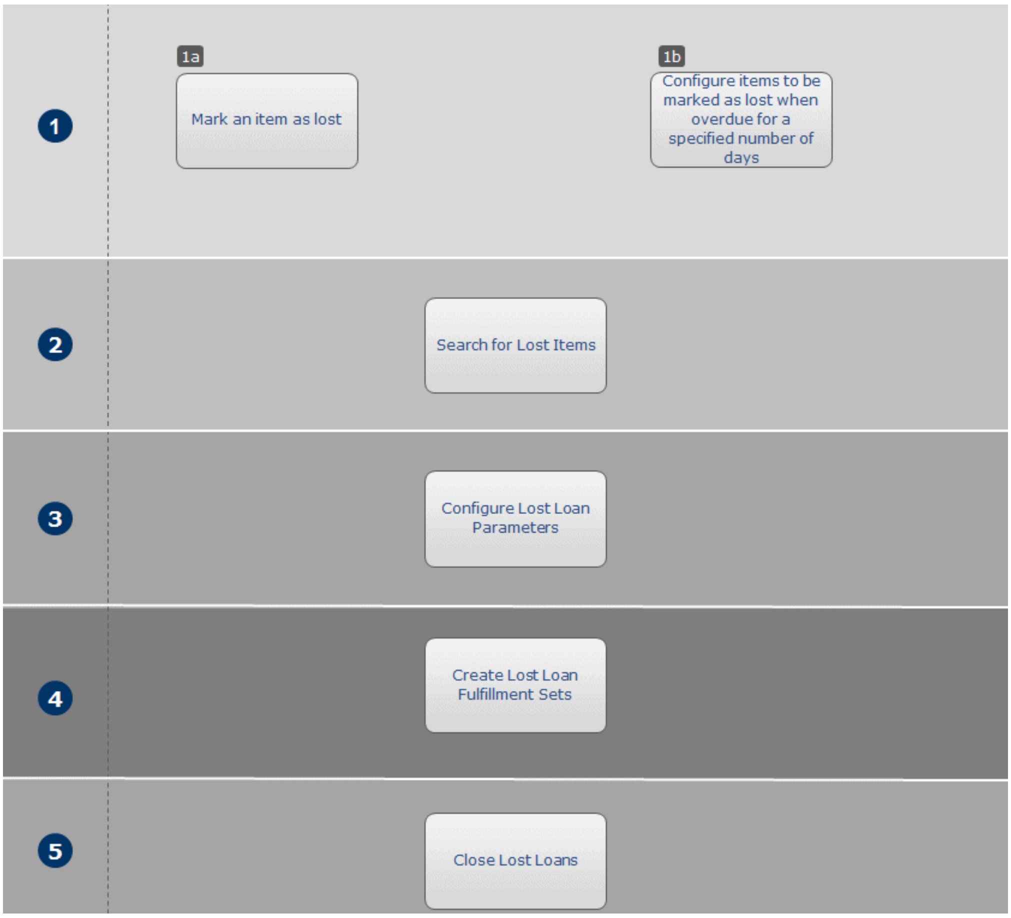


Figure 42: Lost Item Management

The following is a detailed description of the actions that can be performed on lost loans:

1 You mark an item as lost in one of the following ways:

   a On the Patron Services page (**Fulfillment > Checkout/ Checkin > Manage Patron Services**), locate the patron that borrowed the item and select **Actions > Lost** for the relevant item. For details, see **Managing Patron Services** on page **34**.

   b Configure an item to automatically be marked as lost after it is overdue for a a specified number of days. This is done on the Lost Loan Profile Record page (**Fulfillment > Fulfillment Configuration > Configuration Menu** > **Physical Fulfillment** > **Lost Loan Profile**, click **Add Lost Loan Profile**). For details, see **Configuring Overdue and Lost Loan Profiles** on page **311**.

2 You can search for items marked as lost by performing an advanced search in the repository. Click the **Advanced Search** link and in the **Physical Items**

column, select **Process Type**. On the **Advanced Search** page, select **Equals** and **Loan** in the drop-down lists and click **Go**. For details on advanced searches, see **Using the Advanced Search** in the *Alma Resource Management Guide*.

You can also configure the following:

- Lost items can be excluded from appearing in repository searches (configurable in the Resource Management Configuration menu – **Resource Management > Resource Configuration > Configuration Menu > Exclude Process Types from Publishing**). For details, see **Excluding Process Types from Publishing** in the *Alma-Primo Integration Guide.*
- Lost items can be configured as searchable but not as requestable. This is done via the Fulfillment Rules Editor page (**Fulfillment > Fulfillment Configuration > Configuration Menu** > **Physical Fulfillment** > **Fulfillment Units**, select **Actions > Edit** for a Fulfillment Unit and click the **Fulfillment Unit Rules** tab). For details on configuring Fulfillment Unit Rules, see **To add fulfillment unit rules:** on page **280**.

3 You can configure policy types for lost loans which determine how lost loans are handled. Parameters are configured in Fulfillment Configuration (**Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Advanced Policy Configuration > Add Fulfillment Policy**) by selecting the following fulfillment policy types:

- **Lost Item Fine** – The fine which the patron is required to pay for losing the item.
- **Lost Item Replacement Fee** – The amount charged to the patron for the institution to replace the item.
- **Lost Item Replacement Fee Refund Ratio** – The percentage of the lost item replacement fee that the institution is willing to refund to the patron if the lost item is found.

NOTE:
A lost item fine cannot be refunded.

For details on selecting policy types, see **Configuring Policies** on page **282**.

4 You can create a fulfillment set that displays a list of all items lost from a specific date (**Fulfillment > Advanced Tools > Manage Fulfillment Sets**, and configure the **Loan status** value as **Lost**). For details on configuring fulfillment sets, see **Managing Fulfillment Sets** on page **215**. You can then view the fulfillment set on the Manage Sets page (see **Managing Search Queries and Sets** in the *Alma Resource Management Guide*).

5 You can close lost loans by running the **Close lost loans** process (**Administration > Manage Job > Run a Job**). This process closes all loans in

the fulfillment set. Any fines or fees associated with the loan remain on the patron's record. If a lost loan is returned after the loan has been closed, the Lost Item Replacement Fee Refund Ration policy is not invoked; rather, any credit for the returned loan must be applied manually to the patron's record.

NOTE:
If an item is determined to be lost and the policy for a lost loan is **Not Requestable**, the Requests - Recalculate After Inventory Update job detaches the request from the item and potentially cancels the request (if no other items can be used for fulfilling the request). If the item is found, this job re-links the request to the item. For details on the Requests - Recalculate After Inventory Update job, see **Table 15** in the *Alma Administration Guide*.

Returning Items

Managing item returns enables you to view the loan and usage history of returned items. This information is collected when an item has been used within the library and its barcode is scanned into the system. If the barcode cannot be read, you can search for the item. The information is available in Analytics reports (see **Statistics** in the *Alma Analytics – Subject Area Descriptions Guide*) and in the **More Info** dialog box for imported records (see the **More Info** description in **Viewing Imported Records** in the *Alma Acquisitions Guide*).

Loaned items can be returned in either of the following ways:

- Individually – For items loaned to a single patron (see **To return an individual item:** on page **55**)
- Bulk – For items loaned to more than one patron; used to streamline operator workflow and enhance productivity (see **To return items in bulk:** on page **55**)

The returned item is logged in to the system, reshelved, and made available for loaning. The history of returned items is saved indefinitely.

NOTE:
For detailed information on in-house loans, see *In-House Use and Alma Analytics Reports for In-House Use* in the Documentation Center. (Note that you need to be logged in to the Documentation Center in order to view this document.)

You can create relationships between libraries to enable a library to return items for another library (see **Configuring Fulfillment Relationships** in the *Alma Fulfillment Guide*).

When items are loaned and returned by a proxy user, they are stored in the loan and usage history of the borrowing patron only (and not the proxy user). For details on working with proxy users, see **Working With Proxy Users** on page 72).

The return date is checked to determine if there is an overdue fine. If necessary, you can indicate that:

- the item was already returned (see **To claim an item was returned:** on page 49)
- the item was lost (see **To indicate a lost item:** on page 48)

To return an individual item:

1. On the Patron Services page (see **To select a patron whose services you want to manage:** on page 37), click the **Returns** tab.
2. Scan or enter the barcode or click and select the item being returned, and click **OK**. The item details are displayed.

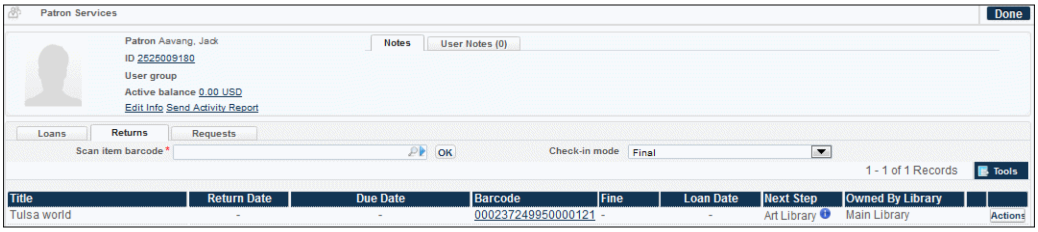


Figure 43: Returns Tab

3. For the relevant loan, select from the following options in **Actions** menu:
   - **Work order** – Creates a request; you can select a work order or other request (see step 2 in **To create a request:** on page 17)
   - **Loan history** – View the audit trail of an item's loan history (see **To view loan notes:** on page 49)
   - **View notes** – View notes regarding a loan (see **To view loan notes:** on page 49)
   - **View queue** – View the queue of requests for an item
4. Click **Done**.

To return items in bulk:

1. On the Manage Item Returns page (**Fulfillment > Checkout/Check-in > Return Items**), scan or enter the item barcode in the **Scan item barcode** field, or click and select the item from the displayed list.
2. In the **Place directly on hold shelf** field, select the relevant option, as follows:

- **Yes** – The item is to be placed directly on the hold shelf. An On Hold Shelf letter is sent to the patron, indicating that the item is ready for pickup at the hold shelf (see **Configuring Alma Letters** in the *Alma Administration Guide*).
- **No** – The item is not yet ready for the hold shelf and is to be designated for hold shelf processing (that is, preparing the item for the hold shelf, such as checking the item's condition). After hold shelf processing is complete, scan the item into the relevant circulation desk. The item is placed on the circulation desk's hold shelf, and an On Hold Shelf letter is sent to the patron, indicating that the item is ready for pickup at the hold shelf (see **Configuring Alma Letters** in the *Alma Administration Guide*).

This field is displayed only when the **Has hold shelf processing** option is selected when configuring a circulation desk (see **Configuring Circulation Desks** on page **249**).

3 Click **OK**. The item details are displayed on the Manage Item Returns page.

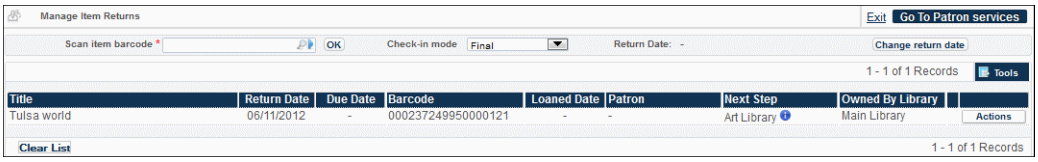


Figure 44: Manage Item Returns Page

NOTES:

You can use the following keyboard shortcuts on the Manage Item Returns page:

- **Alt + Ctrl + L** – Opens the patron identification page (see **Selecting a Patron on page 36**)
- **Alt + Shift + C** – Clears the list of returned items
- **Alt + Shift + X** – Returns to the Alma homepage

4 If needed, modify the return date as follows:

NOTE:
By default, the return date is set to the current date.

a. Click **Change Return Date**. The Select Return Date dialog box opens.

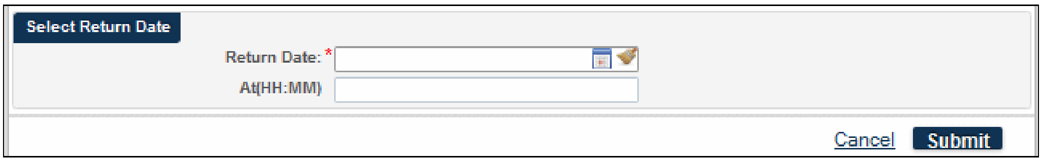


Figure 45: Select Return Date Dialog Box

b. Click in the **Return date** box and select the return date from the Calendar dialog box.

NOTE:
The return date must be set to a date prior to the current date.

c. Optionally, select the return due time in the **At** field. When the time is not specified, the system uses the closing time of the new return date.

d. Click **Submit**. The return date is changed on the Manage Item Returns page.

   To reset the return date to the current date, click **Reset Return Date**.

5. If required, select one of the following options:
   - **Actions > Work order** – Creates a request; you can select a work order or other request (see step **2** in **To create a request:** on page **17**)
   - **Actions > Loan history** – Displays an audit trail of an item's loan history (see **To view loan notes:** on page **49**)
   - **Actions > View notes** – Displays notes on the loan (see **To view loan notes:** on page **49**)
6. Click **Exit** to exit the page, or click **Go to Patron Services** to open the **Patron Identification** page.

Viewing Fines and Fees and Receiving Payments

Patrons may incur fines and fees for many reasons. The Fines and Fees tab on the User Details pages allows circulation desk operators to view patron fines and fees (see **Viewing a Patron's Fines and Fees** on page **58**) and to receive payment for them (see **Receiving Payment for Fines and Fees** on page **58**).

If payments are made online via the WPM Education e-payment system, circulation desk operators may need to manually record any transactions that may have been paid directly to the WPM Education e-payment system by the patron. These payments are tracked by their payment method (online) and the transaction ID, which is sent in the patron's transaction confirmation message from the WPM Education e-payment system. To handle these types of transactions, see **Recording Online Payments Manually** on page **61**.

Viewing a Patron's Fines and Fees

The Fine and Fees tab on the User Details page lists all fines and fees for a patron.

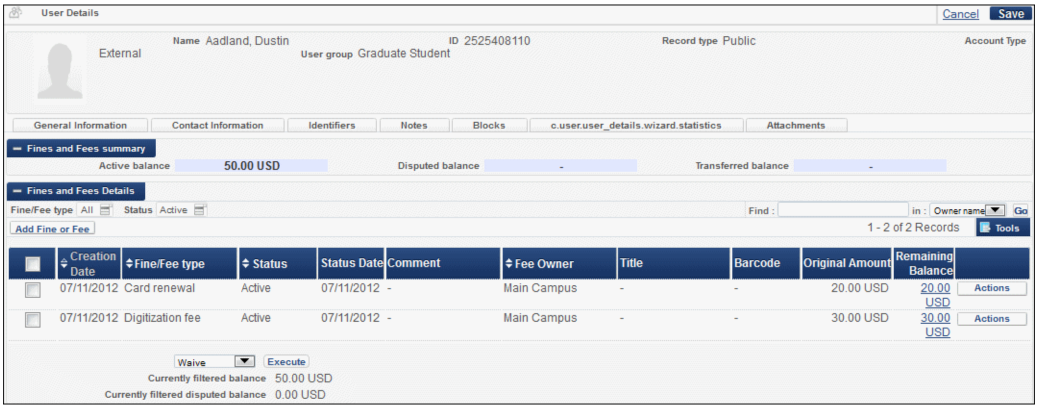


Figure 46: User Details Page – Fines/Fees Tab

The Fines and Fees Summary area displays amounts for:

- Active balance
- Disputed balance
- Transferred balance

The **Fines and Fees Details** area displays a list of fines and fees that have been charged to the patron.

To view a patron's fines and fees:

1. On the Patron Identification page (**Fulfillment > Checkout/Check-in > Manage Patron Services**), enter the patron's name in the **Scan patron's ID or search for patron** field and click **Go**.

   The Patron Services page opens.

2. Click the value in the **Active balance** link.

   The **Fines/Fees** tab on the User Details page opens. For details on adding fines and fees, see **Working With Fines/Fees** in the *Alma Administration Guide*.

3. Click **Save** or **Cancel** to return to the Patron Services page.

Receiving Payment for Fines and Fees

The Patron Services page allows circulation desk operators to receive payments from patrons for fines and fees.

To receive payments:

1 On the Patron Identification page (**Fulfillment > Checkout/Check-in > Manage Patron Services**), enter the patron's name in the **Scan patron's ID or search for patron** field and click **Go**.

The Patron Services page opens.

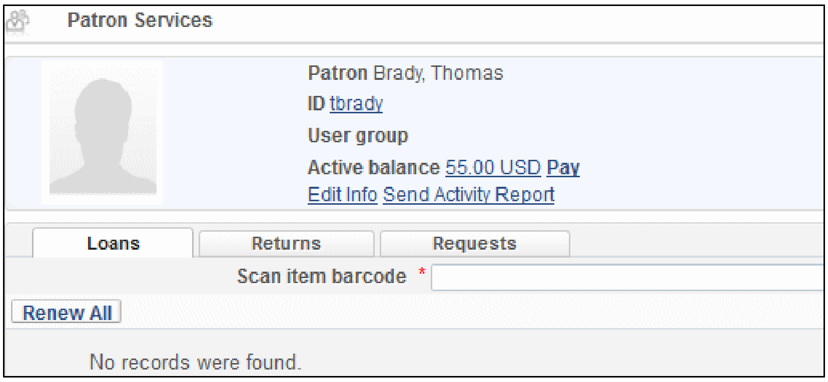


Figure 47: Patron Services Page

2 Click the **Pay** link (to the right of the **Active balance** link).

The Payment Details dialog box opens.

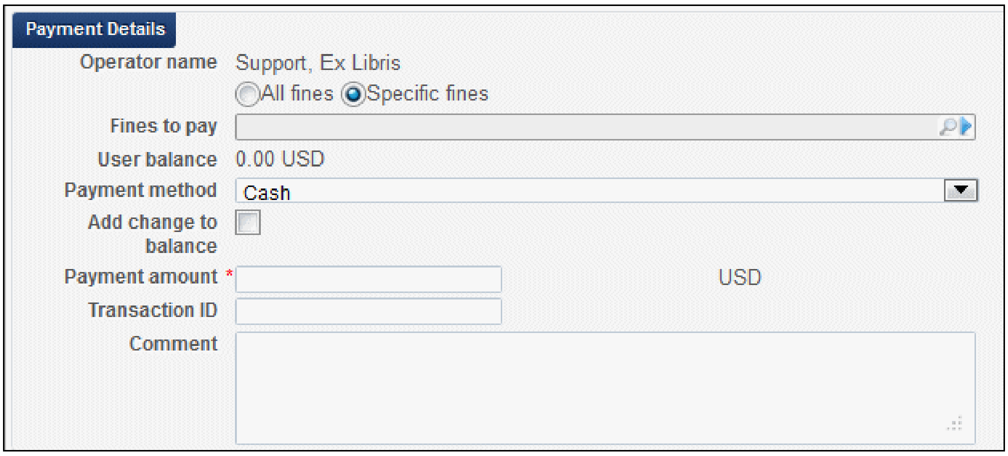


Figure 48: Payment Details Dialog Box

3 Under the **Operator name**, select whether you want to pay all of the patron's fines (**All fines**), or only specific fines (**Specific fines**).

When selecting **Specific fines**, the **Fines to pay** field appears.

a Click the Browse icon to specify the specific fines to be paid. The User Fines and Fees page opens.

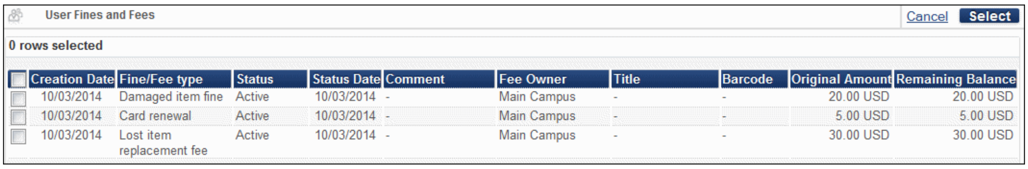


Figure 49: User Fines and Fees Page

b Select the check boxes of the fines and fees that you want to pay and click **Select**. The Payment Details dialog box displays the balance of the selected items in the **User balance** field.

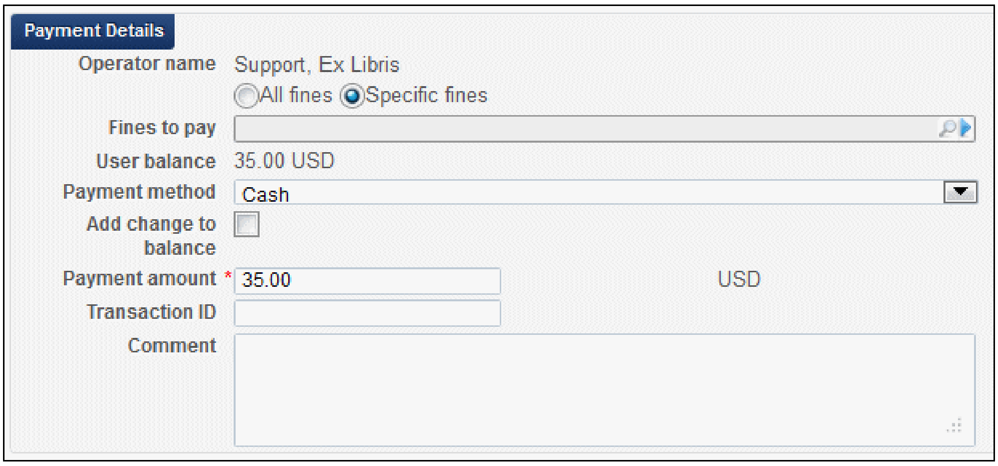


Figure 50: Patron Details Dialog Box – With Balance

VIDEO:

For more information about paying specific fines and fees, see the *Pay Specific Fines and Fees* video (5:02 mins).

4 In the **Payment method** drop-down field, select a payment method (such as **Cash**, **Check, Credit Card** or **Online**). For information on online transactions, see **Recording Online Payments Manually** on page **61**.

NOTE:

Payment method options can be customized. For example, you can change the **Check** option to **Cheque**. To customize payment methods, contact Ex Libris Support.

5 Select **Add change to balance** to indicate that when paying an amount greater than the balance, a credit is to be generated for the extra payment. If this box is not selected, the system returns the extra payment to the patron.

6 In the **Payment amount** field, enter the payment amount you are receiving.

7 In the **Transaction ID** field, enter a transaction ID.

8 In the **Comment** box, enter descriptive information for the fine/fee.

9 Click **Send** and then click **Confirm** in the Confirmation message dialog box to pay for the fines. The Patron Services page opens and displays the updated balance.

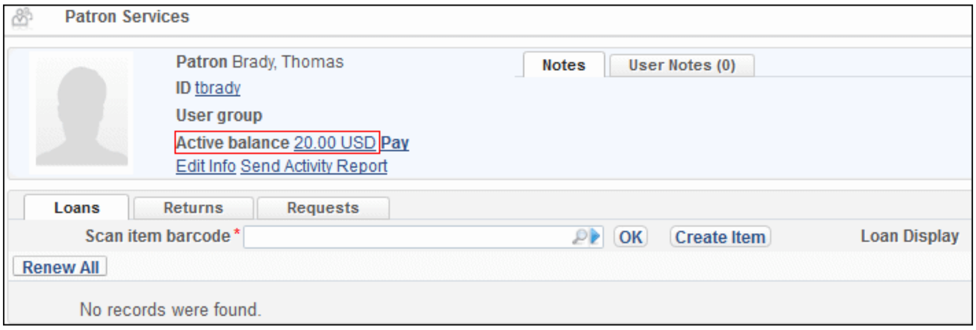


Figure 51: Patron Services Page – Updated Active Balance

You can also pay specific fines/fees in either of the following ways:

- Self-check machines – If the self-check integration profile has been set up with the **Extended Fines and Fees** extension type, the **SIP2 Fee Paid** action can receive the following field pairs:
  - **BZ** – Payment transaction number, to attach to payment section
  - **EK** – Fee to be paid

  For details on self-check machines, see **Self-Check Machines** in the *Alma Integrations with External Systems Guide*.
- Web service – See https://developers.exlibrisgroup.com/alma/apis/soap/user/cash.

Recording Online Payments Manually

If a payment is made directly to the WPM e-payment system, Alma may not be made aware of the transaction. The Patron Services page allows circulation desk operators to manually record payment information for these types of transactions in order to update a patron's account.

To manually record online payments:

1 On the Patron Identification page (**Fulfillment > Checkout/Check-in > Manage Patron Services**), enter the patron's name in the **Scan patron's ID or search for patron** field and click **Go**.

The Patron Services page opens.

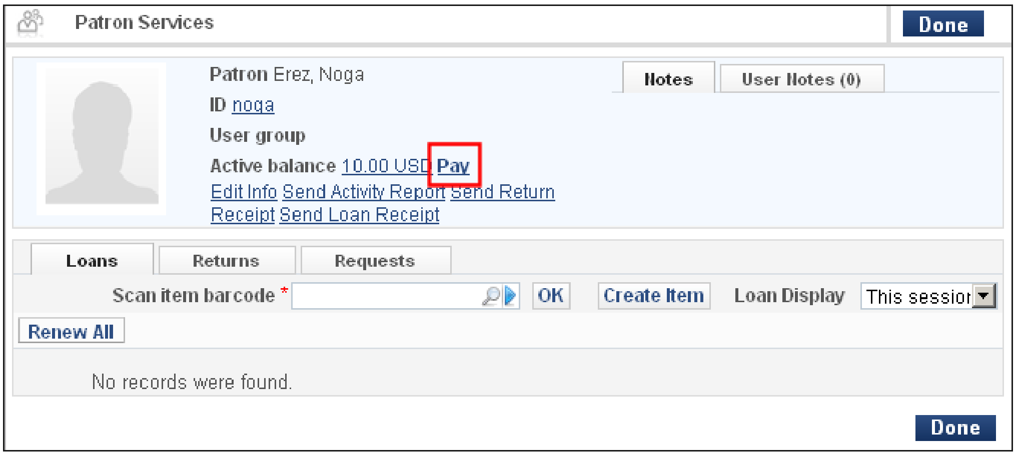


Figure 52: Pay Link on Patron Services Page

2 Click the **Pay** link.

The Payment Details dialog box opens.

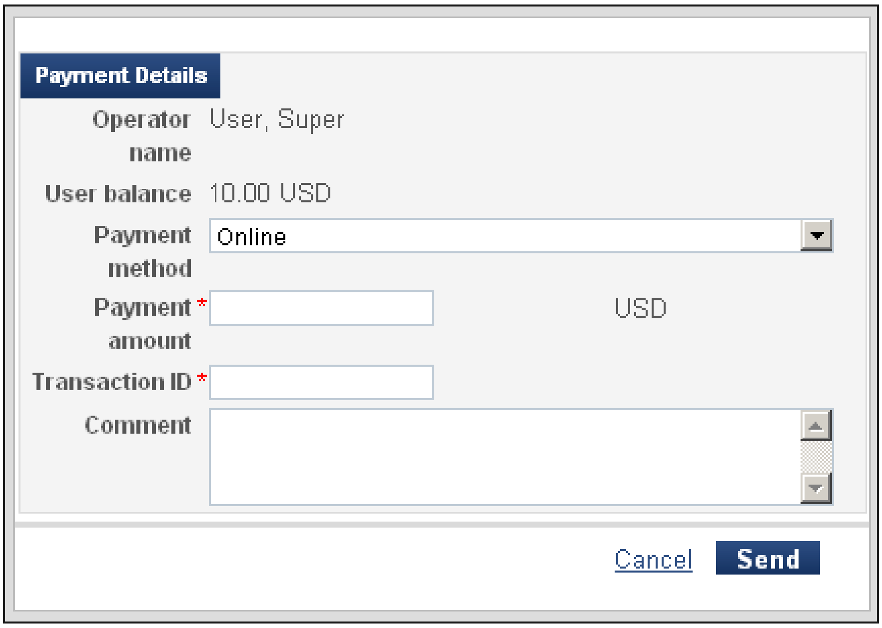


Figure 53: Payment Details

3 Select **Online** from the **Payment method** drop-down list.

4 Enter the payment amount and transaction ID, which are both listed in the user's transaction confirmation email.

5 Click **Send**.

Requested Items

You can view a list of requested items in the Requests tab. Enter your search criteria in the **Find** box at the top of the page and click **Go**, or select a context in which to search from the **Request Type** or **Task** filter.

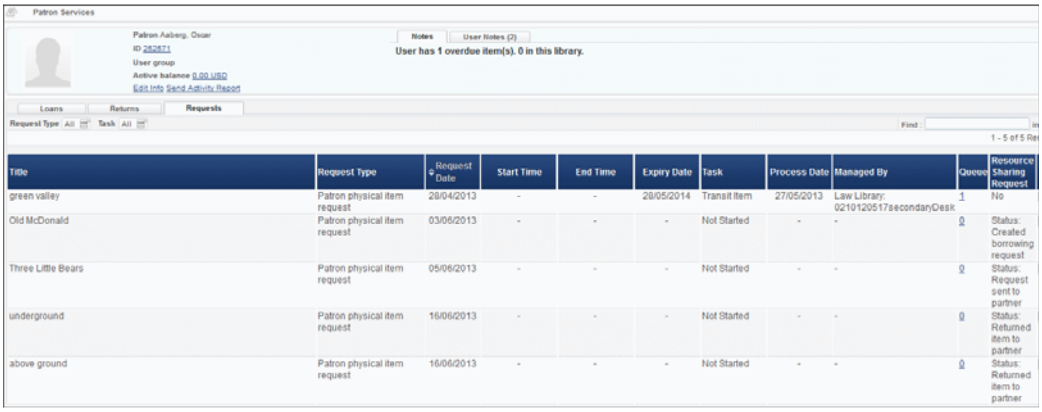


Figure 54: Patron Services Page – Requests Tab

This page allows you to perform the following actions per item in the list:

- To edit the request, select **Actions > Edit**. The Create Request page opens, enabling you to edit the request's parameters (see **Creating a Request** on page 16).
- To cancel the request, select **Actions > Cancel**.

NOTE:

The **Resource Sharing Request** column indicates the status of the resource sharing request. If no resource sharing request exists, the value of this column is **No**.

3

Booking

This section includes:

Booking Overview

Booking items in Alma reserves resources for a patron that are to be used during a specified time frame. For example, if a researcher has located resources in a library's catalog that are necessary for his work, and he can be at the library only during a specific time, he can create a booking request to reserve those resources for the time that he is scheduled to be at the library. This provides exclusive rights to the materials reserved while the requester is physically at the library, thereby making maximum use of their limited time frame.

Booking resources can also be used for high-demand items with a limited number of copies. For example, resources moved to a course-reserved area can be configured to be requestable via booking requests, usable for a set time period before the item must be returned.

Items with running processes cannot be booked during the duration of the process' running time. For example, an item that is on loan can be booked only after its due date, and an item that is on the hold shelf can be booked only after its hold shelf period is over and its loan due date has passed. Items with running processes that do not have an expected end time cannot be booked. Additionally, items that are reserved for booking cannot be placed on loan or on the hold shelf.

VIDEO:
For more information about Booking, see the *Booking in Alma* video (22:20 mins). For a detailed Ask the Expert session on booking, see *Booking*.

NOTE:
Alma prevents a hold request from activating (entering the Pickup from Shelf list) if there is a booking within the hold shelf period + loan period.

When configuring a booking request, the following booking configuration settings can be set:

- **Booking release time** – Indicates the amount of time after the booking request takes effect that the institution cancels the request if the resource has not been collected.
- **Is item bookable** – Indicates whether booking is allowed for the specified item.
- **Maximum allowed booking length** – Indicates the maximum permitted duration of the booking request.
- **Preview period** – Indicates the amount of time prior to the booking period that the requester can borrow the item and fulfill the booking request. During this period, the booking request is considered active, and an item cannot be borrowed by another patron during a configured preview period. Similarly, a patron who borrows an item reserved for booking must return it by the configured preview period.

  Even if no preview period is configured, if the requester borrows the item (which he/she has reserved for booking) as a regular loan which is to be due during the booking period, the requester is allowed to keep the item until the end of the booking period.

  Items for which the preview location is different than the owning library have their preview time extended to include both the preview time and the transit time between the libraries.
- **Pickup locations** – Indicates from where the item can be picked up.
- **Future limit** – Indicates how far in advance an item can be reserved through a booking request.
- **Back to back booking** – Indicates the minimum amount of time required between consecutive bookings (booking requests for the same resource & requester).

For details on configuring booking policies, see **Configuring Policies** on page 282.

Booking Workflow

The following is an illustration of the booking requests workflow that governs the way the booking process is managed. The workflow outlines the configuration tasks necessary to implement booking requests, as well as the procedure for booking items in Alma.

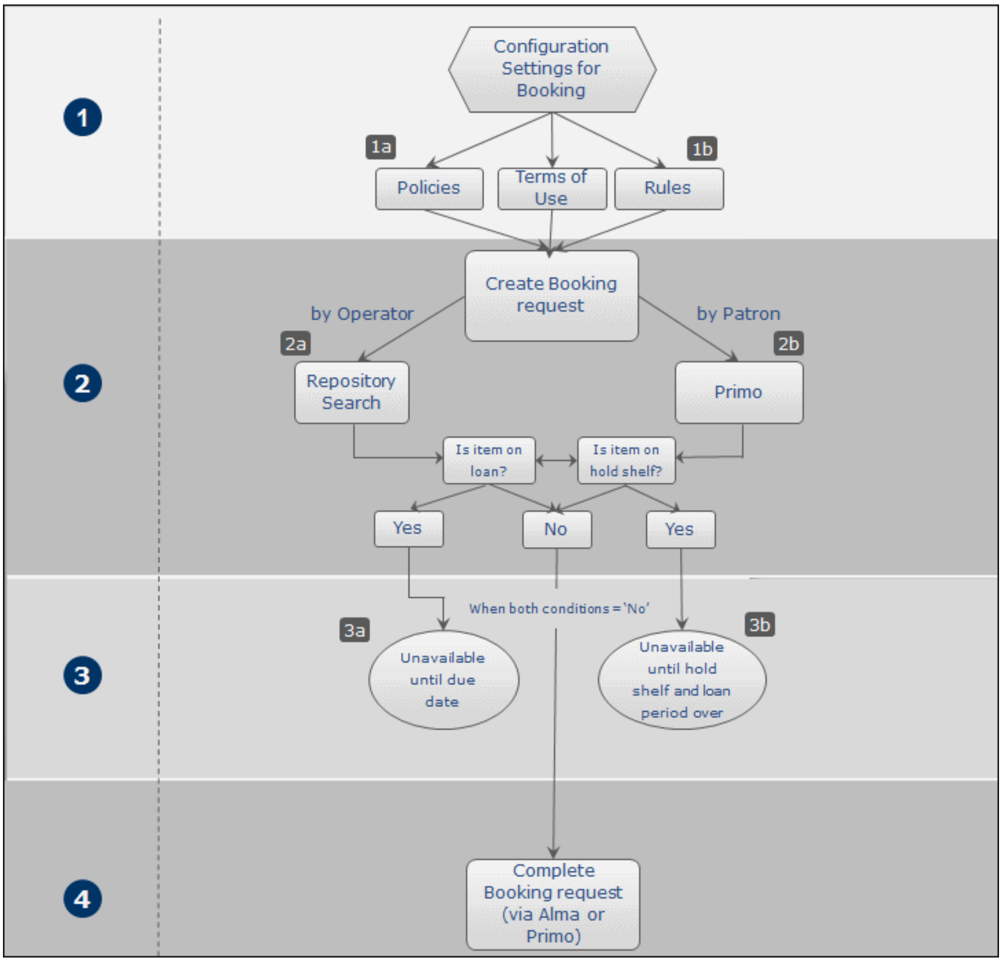


Figure 55: Booking Workflow

The following is a detailed description of the steps within this workflow (with the numbers corresponding to the numbers in the diagram):

1 Invoke the relevant Booking configuration settings, as follows:

   a **Policies** – You create the relevant booking policies to enable parameters for booking requests (see **Configuring Policies** on page 282)

   b **Terms of Use** – You create booking terms of use to invoke the configured booking policies (see **Configuring Terms of Use** on page 293)

   c **Rules** – You create rules that indicate which booking terms of use are to be applied for the specified fulfillment unit locations (see **To add fulfillment unit rules:** on page 280)

2 Create a booking request via one of the following methods:

   a **Repository Search** – Performed by the Fulfillment Services Operator on behalf of a patron

   b **Primo** – Performed by a Patron

3 Alma verifies the availability of the item, as follows:

   a If the item is on loan, it is unavailable until the item's due date is reached.

   b If the item is on the hold shelf, it is unavailable until the hold shelf period is over and the item's due date is reached.

NOTE:

If the item is being processed by a work order, it is unavailable before the work order's end date.

If the item is neither on loan nor on the hold shelf or processed by a work order, it is available and the booking request can be processed and completed.

4 The booking request is processed and completed – see Step **3** through Step **12** in **To create a booking request:** on page **69**.

Creating Booking Requests

PERMISSIONS:

To set configuration settings for booking requests, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

To create a booking request, you must have one of the following roles:

- Fulfillment Services Operator
- Fulfillment Services Manager

Before creating a booking request for a resource, you first must configure the relevant booking fulfillment policies (see **Configuring Policies** on page **282**), create booking terms of use to which you associate the created policies (see **Configuring Terms of Use** on page **293**), and then create rules which determine the booking terms of use to be implemented (see **To add fulfillment unit rules:** on page **280**). You then create the actual booking request for an item; the available parameters are based on the configured policies and terms of use.

A booking request can be placed on an item if there is at least one available item in the institution/library that matches the specified request parameters. If other requests already exist for an item, no booking request can be placed on it.

When placing a booking request on a specific item within a record that contains multiple items, note the following:

- If the record's items contain descriptions:

  Only the specific item attached to the booking request can fulfill that request (even though there are other items associated with the record). If an operator tries to loan an item other than the specific item which was requested, the booking request cannot be fulfilled with that item.

- If the record's items do not contain descriptions:

  Any item associated with the record can fulfill the request, as the request is placed on the title level. Furthermore, all of the record's items are available to be used for other requests, provided that there is one item remaining to fulfill the booking request.

Items reserved in a booking request cannot be borrowed by another requester during the booking request time frame. However, this can be overridden at a circulation desk, in which case the item's due date is the beginning date of the booking request.

If a booked item is recalled by another patron's request, the patron does not have to return it early, but the item cannot be renewed.

The number of booking requests that are permitted can be limited per patron type. For details, see **Configuring Patron Limits** on page **319**.

To create a booking request:

1. On the Repository Search page (**Resource Management > Search and Sets > Repository Search**), locate an item for which you want to create a booking request (see **Searching in the Repository** on page **15**).
2. Click **Request** for the relevant item. The Create Request page displays.

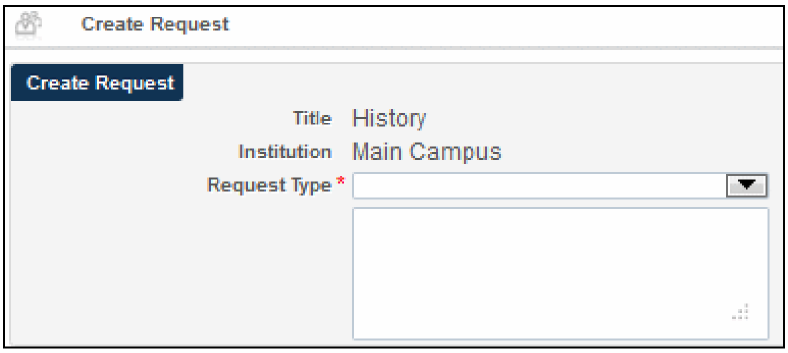


Figure 56: Create Request Page

3 In the **Request type** field, select **Booking request**. The page automatically refreshes and displays the booking request fields.

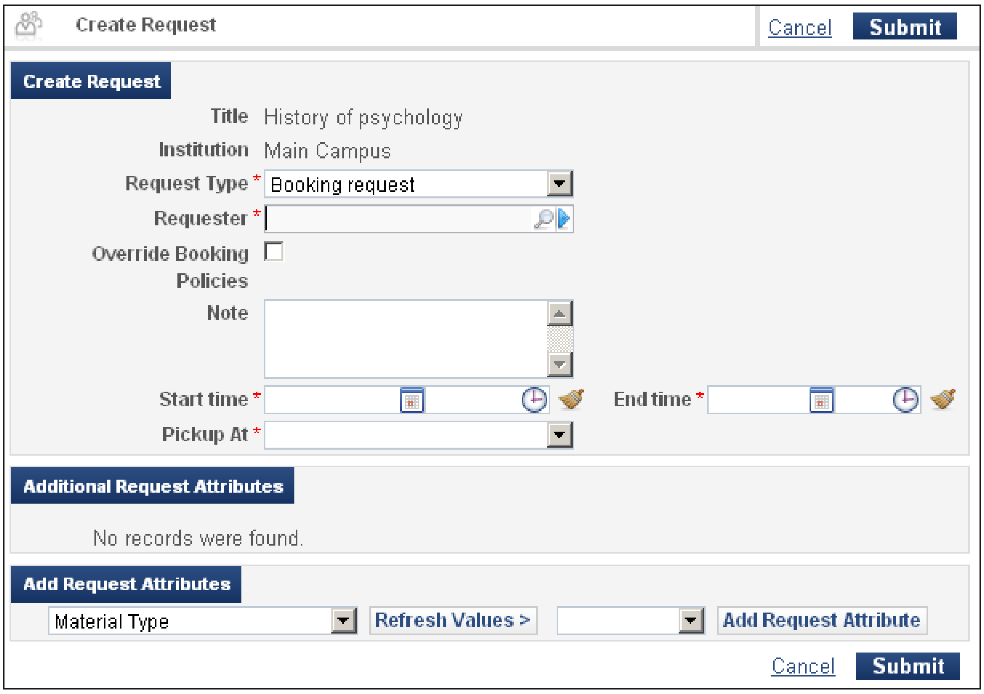


Figure 57: Create Request Page for Booking Request

4 In the **Requester** field, browse for the user that is requesting the booking.

5 Select the **Override Booking Policies** check box if you want to ignore the following booking policies and still create a booking request: future limit, maximum allowed booking length, and back to back bookings by the same user.

6 Optionally, enter a note in the **Note** field.

7 In the **Start time** field, enter the date and time that the booking is to start.

8 In the **End time** field, enter the date and time that the booking is to end.

The **Start time** and **End time** are automatically moved back or forward, as necessary, to ensure that they occur during the library's open hours. The updated start and end times are displayed on the page after the request is submitted.

9 In the **Pickup at** field, select a pickup location for the item.

10 In the **Add Request Attributes** section, select additional attributes to add to the request, as necessary, and click **Add Request Attribute**. The attributes are displayed in the **Additional Request Attributes** section.

11 The item’s availability is displayed in calendar format in the **Availability** section of the page.

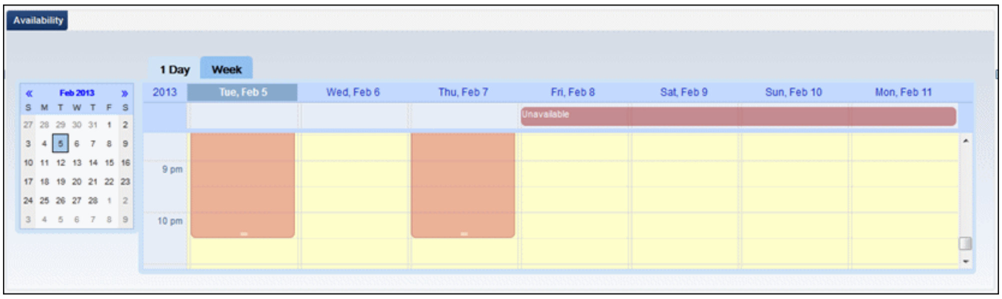


Figure 58: Availability Section of Create Request Page

12 Click **Submit** to submit the booking request. The item is displayed on the Patron Services Page – Requests tab with a Request Type of **Booking** (see **Requested Items** on page 63).

NOTES:

- If a patron wants to borrow a booked item during a configured preview period – the item is not loanable.
- If a patron wants to borrow a booked item and there is no configured preview period – the patron can borrow the item, but it must be returned by the start of the booking period.

4

Resource Requests

This section includes:

Resource Requests Workflow

Resource request options include:

- Delivering a physical item to a patron
- Moving an item
- Digitizing a file for a patron

Several internal staff processes are used to handle these options.

The following is an illustration of the workflow that governs the way a general resource request utilizes internal staff operations.

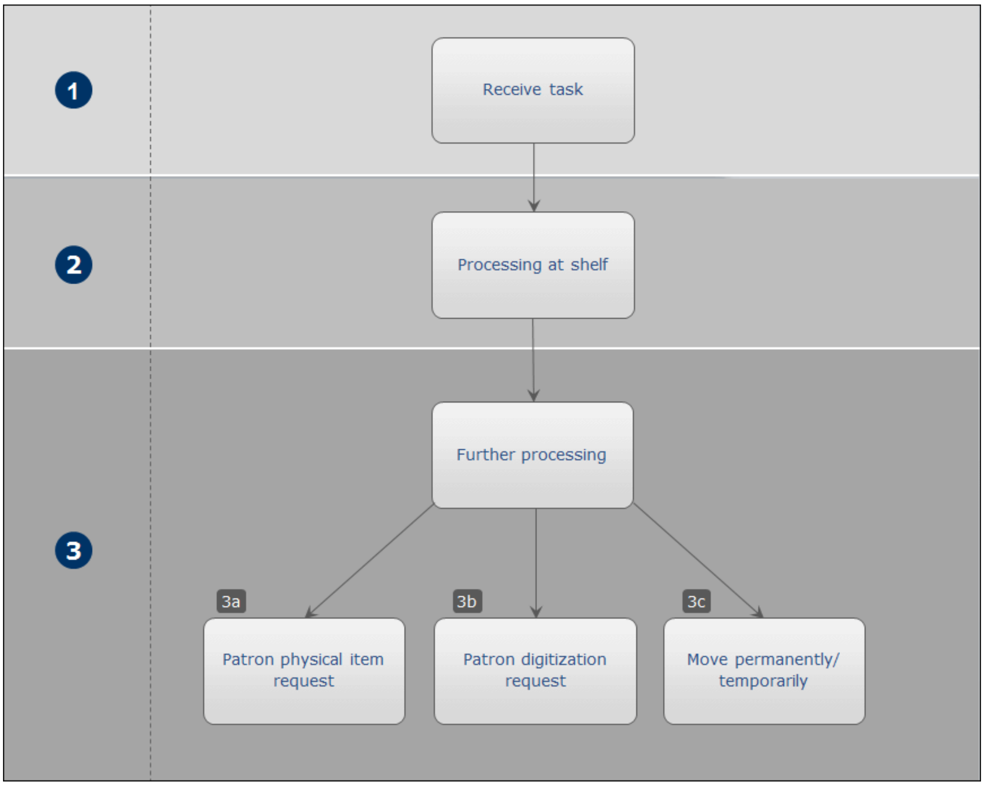


Figure 59: Resource Requests Workflow

The following is a detailed description of the steps within this workflow (the numbers correspond to the numbers in the diagram):

1. A resource request enters the Alma system by the requesting patron via a discovery interface, by the librarian on behalf of the requesting patron, or manually as a result of a staff-initiated request (see **Circulation Desk Operations** on page **11**). The task of locating the item in the institution is given to a Requests Operator (see **Monitor Requests and Work Orders** on page **76**).

2. A call slip is printed and the item is located and taken from its permanent location (see **Pickup at Shelf** on page **81**). Its barcode is scanned (see **Scanning Items** on page **84**), and the call slip is placed with the item. The item is assigned further processing and moved to its required location according to the type of request.

NOTE:

Only one slip is automatically printed per request. A slip that is printed when picking up an item from the shelf can be re-used when placing the item on the hold shelf. However, you can choose to print additional slips as necessary (for example, if the original slip was lost) by clicking **Print Slip** beneath the relevant item.

3 After moving to its new location (for example, the digitization department), the item's barcode is scanned once again and is processed according to the request type:

   a **Patron physical item request** – The item is sent to the circulation desk of the requesting library, and the Circulation Desk Operator loans the item to the patron (see **Circulation Desk Operations** on page **11**).

   b **Patron digitization request** – The digitization department creates a digital file (see **Digitization Processing** on page **102**).

   c **Move permanently** or **Move temporarily** – An internal request is generated to move the item from one location to another (see **Moving Items** on page **94**).

NOTE:

When multiple requests are made for the same title and one request has been processed, the system recalculates the optimal item for fulfilling ensuing requests.

When creating a resource request, an item can have various workflow steps in the course of request creation. The following table describes the workflow steps that you can encounter during the course of creating a resource request (workflow steps are not chronological).

Table 4. Resource Request Workflow Steps

Workflow Step	Description
Awaiting Approval	The request is waiting for approval.
Deposit Item	The digital material is ready to be deposited, but the digital file has not yet been created.
Digitize Item	The item is ready at the digitization department and is in the process of being digitized.
Document Delivery	The digital material is in the process of being delivered.
Hold Shelf Processing	The item is being prepared to be placed on the hold shelf.
On Hold Shelf	The item is on the hold shelf, but has not yet been picked up or removed.
Pickup From Shelf	The item has been picked up from the hold shelf.

Table 4. Resource Request Workflow Steps

Workflow Step	Description

Transit Item	The item is in transit between circulation desks and/or libraries. When an item is in transit:
	■ Only the transit item can fulfill the request
	■ Blocks that exist on other items that can fulfill the request are removed (that is, the other items can be renewed)
	■ The item displays on the Resource Request Monitoring page with the following parameters:
	  ■ **Workflow Step:** Transit Item
	  ■ **Workflow Step Status:** In Process
	  ■ **Process Date:** <The date on which the item was sent>
	  ■ **Expiration Date:** <The date on which the item is scheduled to arrive>

Waiting for Remote Storage	The request is waiting to be fulfilled by a remote storage item.
Work Order Department	The item is in the work order department.

VIDEO:

See *Work Orders and Item Process Management* for a detailed Ask the Expert session on work orders and item process management.

Monitor Requests and Work Orders

PERMISSIONS:

To monitor requests, you must have one of the following roles:

- Fulfillment Operator – view requests for any desk in the library
- Requests Operator – view requests that are assigned to your desk(s)

Requests and work orders that have been created and are pending can be viewed and handled on the Resource Request Monitoring page.

NOTE:

For an in-depth overview of work orders, see *Work Orders and Managing Physical Processes*. Note that you must be logged in to the Documentation Center to access this information.

To monitor requests and work orders:

1 On the Resource Request Monitoring page (**Fulfillment** > **Resource Requests** > **Monitor Requests & Item Processes**), locate specific resources using the **Find** box at the top of the page (or by selecting **Requests** in the persistent search box and entering the request ID, requester name, or request title).

The Resource Requests Monitoring page displays the results:

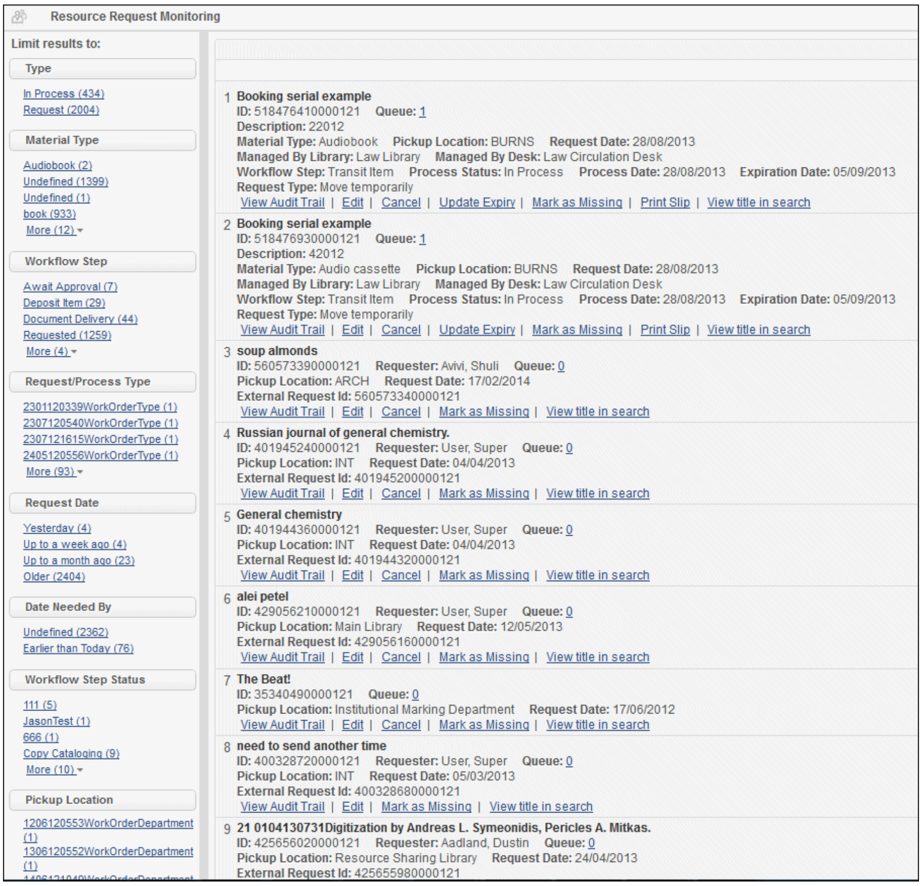


Figure 60: Resource Request Monitoring Page

You can filter results via the facets on the left side of the page. The facets include:

- **Type –** The request type, either a process (**In Process**) or a request (**Request**).
- **Material Type** – Material type specified in the request. Options are: **Audiobook, Audio cassette, Book, Compact Disc, Flash Card, Bound Issue, Issue, DVD,** and **Other**.
- **Process** – Name of the current activity. Options are: **Await Approval**, **Deposit Item**, **Document Delivery**, **Requested**, **On Hold Shelf**, **Transit Item**, **Work Order**, and **Pickup From Shelf**.
- **Request Type** – Type of request. Options are: **Binding**, **Booking Request**, **Patron Electronic Digitization Request, General Hold Request**, **Library Electronic Digitization Request, Move Permanently, Move Temporarily, Patron Physical Item Request, Patron Digitization Request, Ship Digitally, Ship Digitally From Electronic, Ship Physically, Restore Item**, and **Transit for Reshelving**, as well as any configured work order type requests (see **Configuring Work Order Types** in the *Alma Administration Guide*).
- **Request Date** – Date on which the request was placed. Options are: **Today, Up To a Week Ago, Up To a Month Ago** and **Older**.
- **Date Needed By** – Date on which the item is needed. Options are: **Undefined** and **Earlier Than Today**.
- **Process Status** – Status of the current process. Options are: **New, Temp Storage, In Process, Physical Processing, Copy Cataloging,** and **Finish,** and any configured work order type statuses (see **Adding a Work Order Type Status** in the *Alma Administration Guide*).

  A Process Status of **In Process** indicates that the item is undergoing Hold Shelf Processing, in preparation to be placed on the hold shelf. If a request is canceled while the item is in Hold Shelf Processing (**In Process**), the item is transferred to the expired hold shelf (see **Managing Expired Hold Shelf Items** on page **99**).
- **Pickup Location** – Library in which item pickup is requested. Options are the institution’s libraries and any configured work order departments (see **Configuring Work Order Departments** in the *Alma Administration Guide*). Home/office delivery requests are indicated by the **Home Delivery** and **Office Delivery** facets.
- **Owner** – The library in the institution that owns the item.

2 Click one of the following links for a requested item to perform an action on the item:

- **View audit trail** – Opens the Request Processing Audit Trail page, which displays a list of actions taken on the requested item.

Request Processing Audit Trail

Action	Date Activated	End date	Expiration Date	Status
On Hold Shelf	26/03/2012	11/06/2012	12/06/2012	Done
Transit Item	11/06/2012	-	12/06/2012	Expired

Figure 61: Request Processing Audit Trail Page

The **Action** column values that can be displayed on the Request Processing Audit Trail page are:

- On Hold Shelf
- Hold Shelf Processing
- In Process
- Digitize Item
- Deposit Item
- Document Delivery
- Pickup From Shelf
- Await Approval
- Transit Item
- Waiting for Remote Storage

- **Edit** – Opens the Create Request page, where you can edit the request/ work order.
- **Cancel** – Cancels the request. The requester is notified of the cancellation by email.
- **Update expiry** – Updates the expiry date for the request (see the description in **To pick up items at the shelf:** on page 82).
- **Mark as missing** – Indicates that the requested item is missing. Click **Yes** on the resulting Mark as Missing page.
- **Print slip** – Prints a call slip for the requested item.

NOTE:

When an item receives multiple requests, the item is listed only once in the tasks list, but the number of requests for the item is indicated in the **Place in Queue** field. The number of printed slips is the same as the number of requests.

You can click the link next to **Place in Queue:** to open the Request Queue page, where you can view the queue of requests for the specified item.

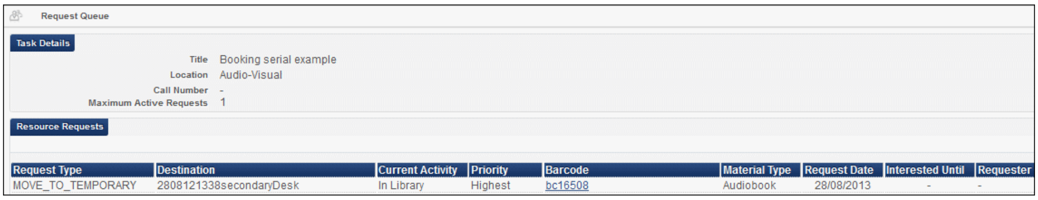


Figure 62: Request Queue Page

The value of the **Place in Queue:** link indicates the place of the request in the queue, as follows:

- **0** – No other requests are in the queue ahead of this one. The request is active; the item is being picked up from the shelf or is on the hold shelf.
- **<other number>** – The number of requests for the item in the queue, including this one. For example, if **Place in Queue = 3**, this request is third in line to be processed by the system. The request is not active (it is waiting in the queue). Requests that are ahead of this one either have a higher priority or have the same priority but were placed at an earlier time than this request.

  If there are multiple items that can fulfill the request and each has a different queue, the value of the longest queue displays (that is, the displayed number is based on the item that is the least readily available).

The **Maximum Active Requests** value indicates the number of requests that currently can be fulfilled (that is, the number of available items).

There are scenarios where requests are fulfilled according to the order that the request was received, and others which are fulfilled according to the request priority. For details, see **Request Priority**, below.

Request Priority

The priority upon which requests are handled depends on whether the requested item is available.

When multiple patrons place a request for an item:

- If the item is available, it is given to the first requesting patron, regardless of the requester's priority (determined by policies/rules in the system).

  For example, if a patron requests an available item at 9:00 AM and another patron with a higher priority requests the same item at 9:15 AM, the first patron is entitled to the item, even though his/her priority is lower. This can be overridden by clicking **Activate** for the desired requester on the **Request**

Queue page. The item is then assigned to the requester for whom you clicked **Activate** and deactivated for the previously assigned requester.

Note that the **Activate** option appears on the Request Queue page only if an item is available and there is more than one request for the item.

If the first requester's request is canceled, the following requester in the queue is determined by priority.

- If the item is not available, the requester with the highest priority is first in the queue and receives the item when it becomes available. When the item is not available, the order of the request queue cannot be changed.

  For details on monitoring requests, see **Monitor Requests and Work Orders** on page 76.

Pickup at Shelf

PERMISSIONS:

To pick up an item from its location, you must have the following role:

- Requests Operator

Requested items are located in the repository and picked up at the shelf. This section describes the task options that are available to the Requests Operator when picking an item up at the shelf.

VIDEO:

Learn how to export a list of pickup from shelf items in the *Export List of Pick from Shelf Items* video (2:23 mins).

In addition to the task options, the following information is displayed in the pickup list for an item:

- **ISBN** – The International Standard Book Number (ISBN) that identifies the book or article
- **ISSN** – The International Standard Serial Number (ISSN) that identifies the book or article
- **Edition**
- **Imprint** – The place of publication, publisher, and date of publication
- **Author**

NOTE:
If there are items to be picked up at the shelf, the Requests Operator's Tasks list on the Alma home page contains a **Requests - pick up from shelf** task, which links to the Pick Up from Shelf page.

To pick up items at the shelf:

1. On the Pick Up Requested Resources page (**Fulfillment > Resource Requests > Pick From Shelf**), locate requested resources from the facets on the left side of the page. The facets that are displayed depend on the characteristics of the request. The available facets include:
   - **Request Date** – Date on which the request was made
   - **Location** – The location where the request items are shelved
   - **Call Number** – Call number of the item
   - **Destination** – Location where the item will be picked up or to which it will be moved
   - **Material Type** – Requested material type
   - **Request Printed** – Filters the list by displaying the requests for which a slip has been printed
   - **Request Reported** – Filters the list by displaying the requests which have been included in a Slip Report (that is, the **Print Slip Report** button was selected for these requests)

NOTE:
If you select a facet which filters out requests for a specific title, (such as selecting **Today** under the **Request Date** facet when requests exist for the title both that were created today and on an earlier day), a **Note** displays indicating the number of requests for the item filtered out by the facet (**Note: 1 Additional request was faceted out**).

2. Select from the following options:
   - **Print slip** – Prints a call slip for the item that can subsequently be attached to the item by the Requests Operator. The item's barcode is scanned (see **Scanning Items** on page **84**), and the call slip is placed with the item. You can also select **Print slip** from the **Print slip** drop-down list and click **Execute**.

     If a slip was printed when picking up an item from the shelf, it can be re-used when placing the item on the hold shelf. However, you can choose to print additional slips as necessary (for example, if the original slip was lost) by clicking this option.
   - **Print Slip Report** – Creates either an XML or Excel report that contains a detailed list of resources that need to be picked up. It can be used

instead of printing separate call slips for each request. The report can be sent to a printer, emailed to a user, or displayed on the screen. This button opens the following dialog box, which allows you specify the format type of the report and the report's destination:

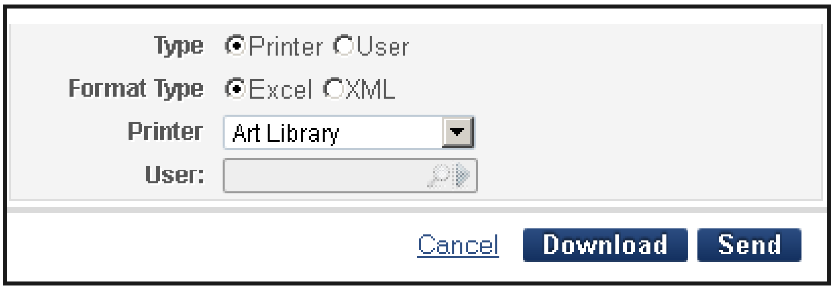


Figure 63: Print Slip Report Dialog Box

Choose one of the following destination types in the **Type** field and click **Send**:

- **Printer** – The Excel report is sent to the printer destination selected from the **Printer** drop-down list.
- **User** – The report is attached to the Print Slip Report Letter that is sent to the email address of the user specified in the **User** field. To customize the Print Slip Report letter, configure the **Ful Pickup Request Report Letter** code table. For more information, see **Configuring Alma Letters** on page **232** in the *Alma Administration Guide*).

If you prefer to view the report on the screen, click **Download** instead of **Send**.

- **Edit request** – Opens the Create Request page, where you can edit the request (see **Creating a Request** on page **16**).
- **Cancel request** – Cancels the request. On the Confirm Request Cancellation page that opens, select a reason from the **Cancellation reason** drop-down box. Enter a cancellation note as needed, and select **Notify user** to send notification of the cancellation to patrons. Click **Confirm**.
- **Update expiry** – Changes the expiry date for the request. Click the expiration date box, select a new date and click **Save**.

  If an expiration date passes and an item is not picked up from the shelf, it is marked as missing. The Requests – Handle Expired Step process tries to locate the item at another location, and if it cannot, it cancels the request for the item. To manually change the item's missing status, you can toggle the item status from **Item not in place** to **Item in place** on the List of Items page (see **Using the List of Items** in the *Alma Resource Management Guide*).

- **Mark as missing** – Indicates the item is missing. Click **Yes** on the Mark as Missing page.
- **Skip location** – Enables using another holding to fulfill the request. This option is available only if the request can be fulfilled by other holdings.

To cancel or print call slips for all of the items, click **Select all** and choose either **Cancel** or **Print slip** from the **Execute** drop-down list, and then click **Execute**.

Scanning Items

PERMISSIONS:

To scan a barcode, you must have the following role:

- Requests Operator

The item's barcode is entered at each location it encounters in the request process. You can either enter the barcode manually, or use a scanning wand to read the barcode electronically. Alternatively, you can enter part of the resource title name, and the system suggests the remainder of the title.

After an item is scanned, in-house loan/usage information is displayed in the following ways:

- Analytics reports (see **Statistics** in the *Alma Analytics – Subject Area Descriptions Guide*)
- On the **History** tab of the Physical Item Editor page, select **Fulfillment activities** (see **Table 41** in the *Alma Resource Management Guide*)
- In the item's **More Info** pop-up window (from the search results of a repository search)

NOTE:

For detailed information on in-house loans, see *In-House Use and Alma Analytics Reports for In-House Use* in the Documentation Center. Note that you need to be logged in to the Documentation Center in order to view this document.

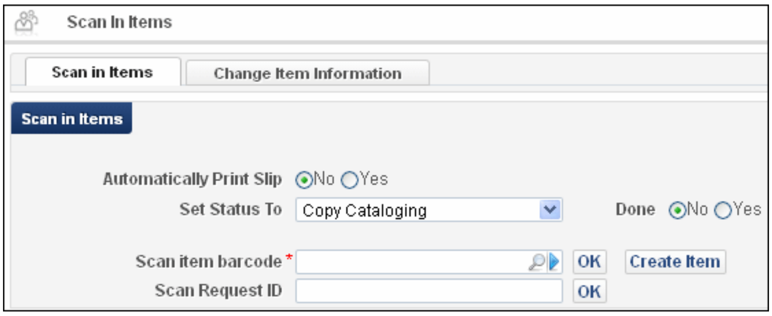


Figure 64: Scan In Items Page

When an item is scanned, an **In House Loan** record is generated automatically.

To scan an item:

1. On the Scan In Items page (**Acquisitions > Post Receiving Processing > Scan In Items** or **Fulfillment > Resource Requests > Scan In Items**), enter the barcode with a wand or manually by either entering it in

the **Scan item barcode** field or clicking the **Browse** icon to search for a barcode. The fields on this page are described in the table below.

Table 5. Scan In Items Fields

Field	Description
Place directly on hold shelf	Select from the following: ■ **Yes** – The item is to be placed directly on the hold shelf. An On Hold Shelf letter is sent to the patron, indicating that the item is ready for pickup at the hold shelf (see **Configuring Alma Letters** in the *Alma Administration Guide*). ■ **No** – The item not yet ready for the hold shelf and is to be designated for hold shelf processing (that is, preparing the item for the hold shelf, such as checking the item's condition). After hold shelf processing is complete, scan the item into the relevant circulation desk. The item is placed on the circulation desk's hold shelf, and an On Hold Shelf letter is sent to the patron, indicating that the item is ready for pickup at the hold shelf (see **Configuring Alma Letters** in the *Alma Administration Guide*). This field is displayed only when the **Has hold shelf processing** option is selected when configuring a circulation desk (see **Configuring Circulation Desks** on page **249**). **NOTE:** Items designated for Hold Shelf Processing are nevertheless displayed as **On Hold Shelf** on the Resource Request Monitoring page (see **Monitor Requests and Work Orders** in the *Alma Fulfillment Guide*). To change the status of a hold shelf processing or hold shelf item, scan the item a second time and modify the value of this field, as required.
Automatically print slip	Specifies the method for printing the slip: ■ **No** – Manual selection is required (default). ■ **Yes** – If multiple requests match the scanned item, one is activated automatically. **NOTE:** This controls the printing of the resource request slip, not the transit slip.

Table 5. Scan In Items Fields

Field	Description
Work order type	Select a work order type for the item being scanned. This field displays only when configuring a circulation desk associated with work orders (a circulation desk associated with work order types is selected in the **Currently at:** field at the top of the page).
External identifier	Indicates whether an identifier, such as a name or an email address, exists for the item in an external system (Select **No** or **Yes**). Displayed only when working at a Resource Sharing library.
Set status to	Select the material status (from a list predefined by an administrator). Note the following: ■ This field is displayed only when the current desk/ department is set to a work order department or a circulation desk defined as a work order department. ■ If this field is not displayed, statuses are set automatically. ■ Values appear in this field only when statuses have been configured as work order type statuses on the General Configuration menu. To add statuses, contact your administrator.
Done	Select to save the value entered in the **Set status to** field. ■ **No** – The item is not complete and remains in its current stage in the workflow. ■ **Yes** – The item is complete and proceeds to the next stage in the workflow. This field is displayed only when the current desk/ department is set to a work order department or a circulation desk defined as a work order department.
Scan item barcode (Required)	The barcode of the item. You can enter part of the barcode and press the down arrow on your keyboard to select from a list of options that match your entry. When you click the **Browse** icon, the Repository Search page opens. Perform a search in the repository, select the item you want, and click **Select**.

Table 5. Scan In Items Fields

Field	Description
Create item	Enables creating a new item, which is entered in the repository and can then be searched for from the **Scan item barcode** field. When clicking this button, the Choose Holding Type pop-up window opens. Select the holding type and, where relevant, the citation type, and click **Choose**. The Quick Cataloging page opens, where you configure resource and item information and click **Save**. After completing this process, an Acquisition Technical Services work order is created for the item (the default work order type). For an in-depth overview of work orders, see *Work Orders and Managing Physical Processes*. Note that you must be logged in to the Documentation Center to access this information.
Scan request ID	If there are multiple requests that may be fulfilled by the item, and the **Automatically print slip** option was not selected, enter the request identification number that was created when a request was submitted, and click **OK**. **NOTE:** If only one item fulfills the request, you can scan in the request identification number, and the item barcode is not needed. If there are multiple copies of the item, you must enter both the barcode and scan request ID.

The item details display in the Scanned In Items table.

The following is an example of the Scan In Items page after scanning in a barcode or request ID.

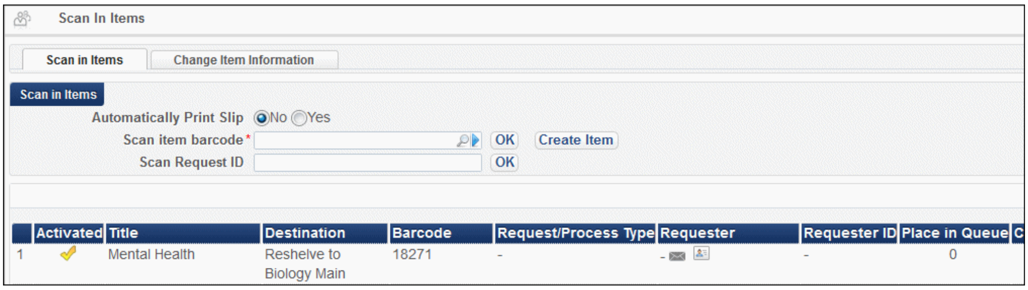


Figure 65: Scanned In Items Page

A description of the Scanned In Items columns is provided in the following table.

Table 6. Scanned In Items Columns

Column	Description
Activated	A yellow check mark indicates that the item has been activated.
Title	The title of the identified resource.
Destination	The library or location to which the item is to be sent. Possible values are: ■ **<Library Name>** ■ **Reshelve To <location name>** ■ **Manage Locally** – Indicates that the item has been scanned in at a Work Order department, and has to be processed there ■ **Digitize** – For resource sharing and digitzation requests ■ **Document Delivery** – For resource sharing and digitzation requests ■ **Deposit** – For resource sharing and digitzation requests ■ **<Partner Name and Request Number>** – For resource sharing requests
Barcode	The barcode of the identified resource.
Request Type	Indicates the reason that the item is being sent.
Requester	The name of the requester.

Table 6. Scanned In Items Columns

Column	Description
Requester ID	The preferred user identifier, as defined in User Management Configuration (see **Configuring Other Settings** in the *Alma Administration Guide*). This column displays a value only for patron-driven requests. **NOTE:** If a value was not configured for this field for a patron-driven request, the user name is displayed.
Queue	A number which is a link to the queue of requests for the scanned-in item.
Checked In	A yellow check mark indicates that the scanned item has a loan attached to it.

NOTE:
To remove all the items in the table, click **Clear List**.

The item continues its processing according to the **Request Type**:

- **Acquisition technical services** – The item is to be processed after the receiving process (Copy cataloging, Physical processing, Temporary storage) is complete.
- **Move permanently** or **Move temporarily** – The item is sent to a different location in the institution (see **Moving Items** in the *Alma Fulfillment Guide*).
- **Patron physical item request –** The item is sent to the active hold shelf at a circulation desk (see **Managing the Hold Shelf** in the *Alma Fulfillment Guide*). An email is sent to the patron to pick up the requested item at the circulation hold desk.
- **Patron digitization request –** The item is sent to the digitization department (see **Digitization Processing** in the *Alma Fulfillment Guide*).
- **Restore –** The item is restored from its temporary location to its permanent location.

2 Select from the following **Actions** button options:

- **Print slip –** Prints a call slip for the item that can subsequently be attached to the item by the Requests Operator.
- **Work order –** Creates a request (see **Creating a Request from the Institution** in the *Alma Fulfillment Guide*).

- **Cancel request –** Opens the Confirm Request Cancellation page, where you select a reason for cancellation from the **Cancellation reason** drop-down box and click **Confirm**.

3 Click **Exit** to return to the Alma home page, or click **Go To Manage Department Items** to open the Items in Department page (see **Managing Receiving Department Tasks** in the *Alma Acquisitions Guide*).

You can also open the Items in Department page by pressing **Alt + Ctrl + M** on your keyboard.

NOTE:
If a physical item is requested by a patron, an email is sent to the patron to pick up the item at the requested circulation hold desk.

Changing Item Information

You can edit any of the information available for an item.

To change item information:

1 On the Scan In Items page (**Fulfillment > Resource Requests > Scan In Items**), click the **Change Item Information** tab.

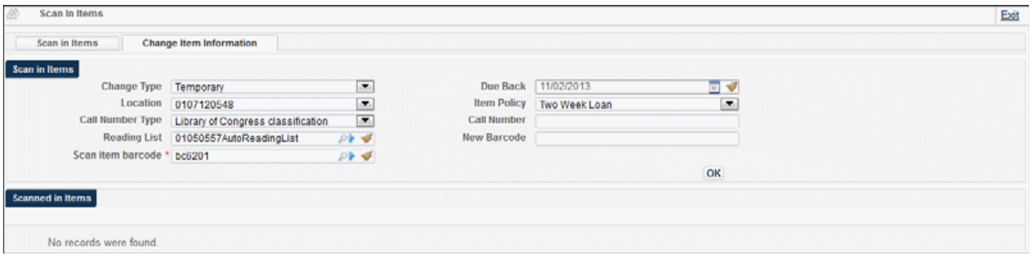


Figure 66: Scan In Items Page – Change Information Tab

2 Change the information as needed. The fields on this page are described in the following table.

Table 7. Change Item Information Fields

Field	Description
Place directly on hold shelf	Select from the following: ■ **Yes** – The item is to be placed directly on the hold shelf. An On Hold Shelf letter is sent to the patron, indicating that the item is ready for pickup at the hold shelf (see **Configuring Alma Letters** in the *Alma Administration Guide*). ■ **No** – The item not yet ready for the hold shelf and is to be designated for Hold Shelf Processing. After Hold Shelf Processing is complete, scan the item into the relevant circulation desk. The item is placed on the circulation desk's hold shelf, and an On Hold Shelf letter is sent to the patron, indicating that the item is ready for pickup at the hold shelf (see **Configuring Alma Letters** in the *Alma Administration Guide*). This field is displayed only when the **Has hold shelf processing** option is selected when configuring a circulation desk (see **Configuring Circulation Desks** on page **249**). **NOTE:** Items designated for Hold Shelf Processing are nevertheless displayed as **On Hold Shelf** on the Resource Request Monitoring page (see **Monitor Requests and Work Orders** on page **76**). To change the status of a Hold Shelf Processing or Hold Shelf item, scan the item a second time and modify the value of this field, as required.
Change type	Select a different type of request (from a list predefined by an administrator). You can select from: ■ Temporary ■ Permanent ■ Restore
Location	Select another library location (from a list predefined by an administrator) in which you want to place the item.

Table 7. Change Item Information Fields

Field	Description
Call number type	Select a different call number type for the location. A call number is a group of numbers and/or letters that indicate where in the library a specific book can be found. You can select from a list defined by the administrator. Available options include: ■ Library of Congress classification ■ Dewey Decimal classification ■ National Library of Medicine classification ■ Other scheme
Reading list	Click **Browse** to open the Reading Lists Task List page and select another predefined reading list with which to associate the item (see **Managing Reading Lists** on page **196**).
Scan item barcode (Required)	Enter a different item barcode. When you enter part of the barcode and click **Browse** , the system suggests items that satisfy your entry. Select the item you want, and click **OK**.
Due back	Click in the field to open the Calendar dialog box and specify a different date for the item to be returned. When a due back date arrives, an automatic job picks up items shelved at temporary locations and places a restore request on them. This triggers a process that moves the items back to their permanent location. (Note that at this stage, the descriptive record may be suppressed from publishing or deleted.) For details on this job, see **Viewing Restore Request Jobs** on page **219**.
Item policy	Select another type of library policy that the item uses (from a list predefined by an administrator).
Call number	Enter another library classification number that identifies the item.
New barcode	Enter a new barcode for the item.

3 In the Scan In Items area, click **OK**. The Scanned In Items area displays the type of request in the **Change type** field.

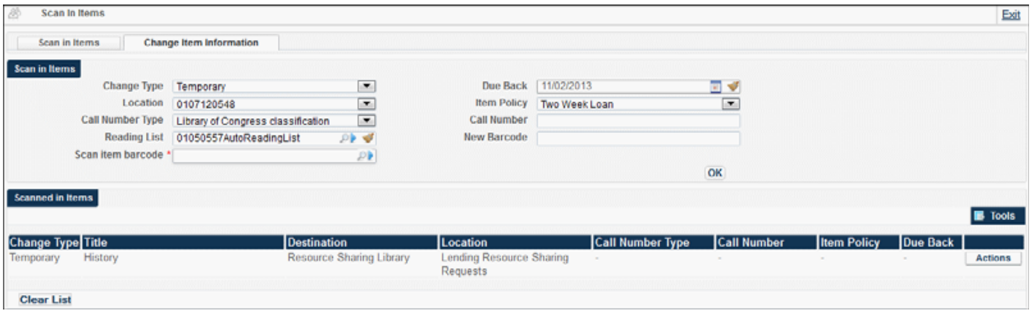


Figure 67: Scan In Items Page – Changed Information

For a description of the Destination column values, see the **Destination** entry in **Table 6**.

To create a print slip for the item that can subsequently be attached to the item by the Requests Operator, select **Actions > Print slip**.

To create a request for the item, select **Actions > Work order** (see **Creating a Request** on page **16**).

Moving Items

PERMISSIONS:

To move an item, you must have the following role:

- Requests Operator

Staff users can request for items in the repository to be moved either permanently or temporarily from one location/library to another.

The Requests Operator sends the item to the requested location, where the barcode is scanned to document its new location.

To move an item:

1. Create a request to move an item permanently or temporarily (see **Creating a Request** on page **16**).
2. Follow the typical **Resource Requests Workflow** on page **73**:
   a. Locate the item (see **Monitor Requests and Work Orders** on page **76**)
   b. Take the item from its location (see **Pickup at Shelf** on page **81**)
   c. Scan the barcode (see **Scanning Items** on page **84**)

d Move the item to its new location, and scan its barcode again (see **Scanning Items** on page **84**)

If additional information about the moved item (such as its location) needs to be changed, select the **Change Item Information** tab (see **Changing Item Information** on page **91**).

Managing the Hold Shelf

PERMISSIONS:

To manage the hold shelf, you must have the following role:

- Requests Operator

After an item that was requested by a patron is picked up from the shelf, it is sent to the hold shelf at the circulation desk. When the item arrives, its barcode is scanned (see **Scanning Items at the Hold Shelf** on page **95**) so the Circulation Desk Operator can manage it (see **Managing Active Hold Shelf Items** on page **96**), and an email is sent to the requested patron indicating the date until which the item is to remain on the hold shelf.

While the item is on the hold shelf, the Requests Operator can request to update the request expiration date (see the description in **To pick up items at the shelf:** on page **82**) or cancel the request (see **To cancel a request:** on page **98**).

If the patron fails to pick up the item by the expiration date, the following occurs:

1 Notification is sent to the requesting patron.

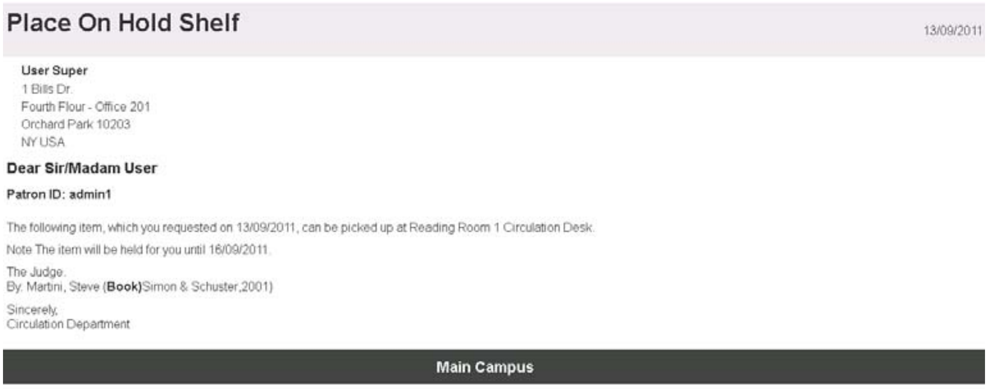
2 The item's request expires (see **Managing Expired Hold Shelf Items** on page **99**) and the item is returned to its permanent location.

Scanning Items at the Hold Shelf

For instructions on scanning in items, see **Scanning Items** on page **84**.

After the item is scanned, an email is sent to the requester indicating that the item can be picked up from the circulation desk.

The following is an example of the email sent to a requester, listing details of the requested item. The email is also placed in the **Attachments** tab of the User Details page.



Place On Hold Shelf 13/09/2011

User Super
1 Bills Dr.
Fourth Flour - Office 201
Orchard Park 10203
NY USA

Dear Sir/Madam User

Patron ID: admin1

The following item, which you requested on 13/09/2011, can be picked up at Reading Room 1 Circulation Desk.

Note The item will be held for you until 16/09/2011.

The Judge.
By. Martini, Steve (**Book**)Simon & Schuster,2001)

Sincerely,
Circulation Department

Main Campus

Figure 68: Place On Hold Shelf Email

Emails can be customized on the General Configuration page by the General System Administrator (see **Configuring Alma Letters** in the *Alma Administration Guide*).

Managing Active Hold Shelf Items

From the moment the item arrives at the hold shelf until it is removed, it is considered to be on the active hold shelf of the circulation desk.

The Active Hold Shelf Items page (**Fulfillment > Resource Requests > Active Hold Shelf Items**) contains the following tabs:

- **Waiting for Pickup** – Displays the Active Hold Shelf Items that are waiting to be picked up by a patron. The Circulation Desk Operator can click the relevant link beneath the item to perform the following actions:
  - **Cancel request** – See **To cancel a request:** on page **98**.

    When you cancel a hold shelf item created as a resource sharing borrowing request, the request still displays in the Resource Sharing Borrowing Requests list if the item is in a process (see **Managing Resource Sharing Borrowing Requests** on page **128**).
  - **Update expiry** – Opens the Update Expiration Date dialog box, in which you can change the request expiration date.
  - **Mark as missing** – Opens the Mark as Missing page, on which you can mark an item as missing.

  After performing one of the above actions, click **Back** to return to the Active Hold Shelf Items page.
- **Held by Patron** – Displays the requested items that are currently held by a patron. When selecting this tab, the name of the page changes to **At Reading Room Items**. Select from the following options:

- **Receive from patron** – Receive the item from the patron. The item is transferred to the On Shelf (Not Final) tab.
- **Print slip** – Prints a call slip for the item that can subsequently be attached to the item by the Requests Operator.

  You can generate print slips for multiple items simultaneously by selecting the check boxes of the relevant items and clicking the **Print Slips** button.

- **On Shelf (Not Final)** – Displays the items that have been loaned to a patron but are still on the shelf in the reading room. Select from the following options:
  - **Loan to patron** – Transfers the item to the patron. The item is transferred to the Held by Patron tab.
  - **Print slip** – Prints a call slip for the item that can subsequently be attached to the item by the Requests Operator.

Figure 69: Active Hold Shelf Items Page

You can select from the **Sort by** drop-down list to sort results by specific criteria. The options displayed vary, depending on the currently selected tab.

To cancel a request:

1 Click **Cancel request** for the relevant item. The Confirm Request Cancellation page opens.

Figure 70: Confirm Cancellation Page

2 From the **Cancellation reason** drop-down list, select a reason for cancellation.

3 Enter any notes in the **Cancellation note** field.

4 To send an email notifying the requester that the request has been canceled and that the item has been returned to its permanent location, select the **Notify user** check box. Emails can be customized on the General Configuration page by the General System Administrator (see **Configuring Alma Letters** in the *Alma Administration Guide*).

5 Click **Confirm**. The request is canceled and the item is returned to its permanent location. The next step for the item is displayed at the top of the page.

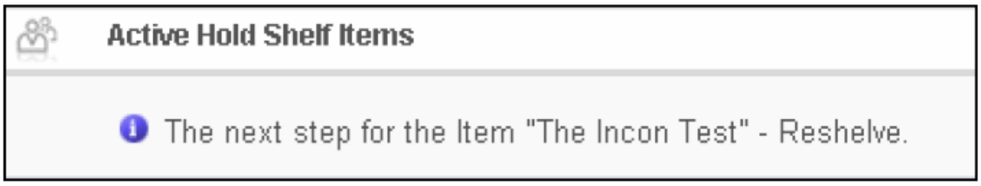
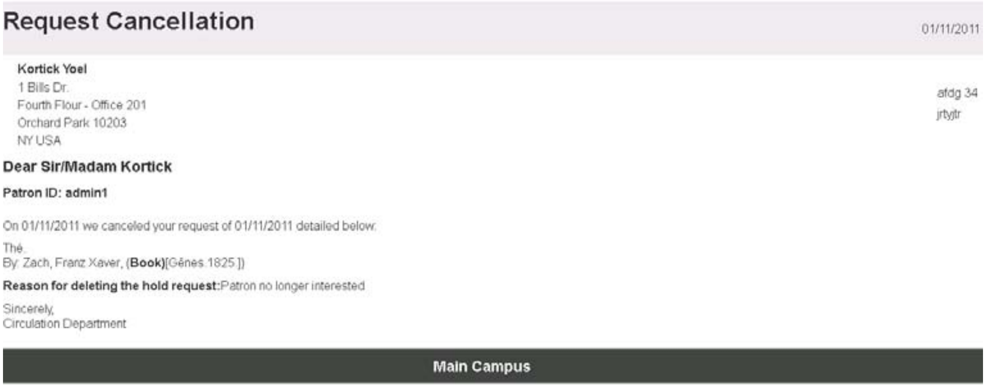


Figure 71: Next Step After Active Hold Shelf Cancellation

The following is an example of an email sent to a requester, listing details of the canceled item. The email is also placed in the **Attachments** tab of the User Details page.


Request Cancellation 01/11/2011

Kortick Yoel
1 Bills Dr.
Fourth Flour - Office 201
Orchard Park 10203
NY USA

afdg 34
jrtyjtr

Dear Sir/Madam Kortick

Patron ID: admin1

On 01/11/2011 we canceled your request of 01/11/2011 detailed below:

Thé.
By: Zach, Franz Xaver, (Book)[Gênes 1825.])

Reason for deleting the hold request:Patron no longer interested

Sincerely,
Circulation Department

Main Campus

Figure 72: Email Notification of Cancellation

Managing Expired Hold Shelf Items

When an item’s expiration date is reached, the item is listed on the Expired Hold Shelf page. If it is not collected by a specified time, it is removed from the circulation desk’s hold shelf and returned to its permanent location.

To manage an expired hold shelf item:

1. On the Expired Hold Shelf Items page (**Fulfillment > Resource Requests > Expired Hold Shelf**), select the type of items you want to view from the **Items** drop-down list: **Picked up by user** or **Waiting for pickup**.
2. Select one of the following tabs:
   - **Reshelve**

     Displays all expired requests for items belonging to the current circulation desk and for which there is no other request in the queue.

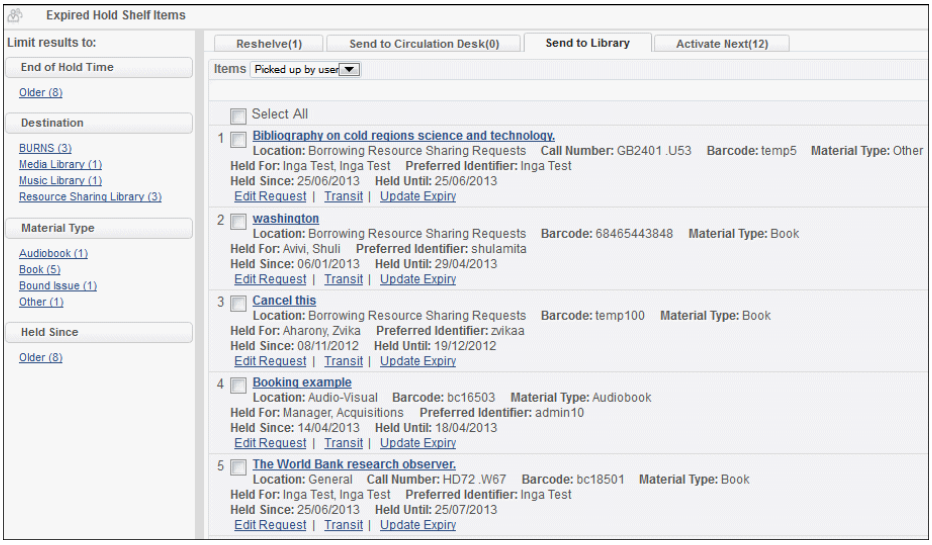


Figure 73: Expired Hold Shelf Items Page – Reshelve Tab

To reshelve an item, click the **Reshelve** link beneath the item or, to reshelve multiple items, select the check boxes of the relevant items and click **Reshelve**.

- **Send to Circulation Desk**

  Lists all requests for items belonging to a different circulation desk in the same library or that are requested for pickup at another desk within the same library.

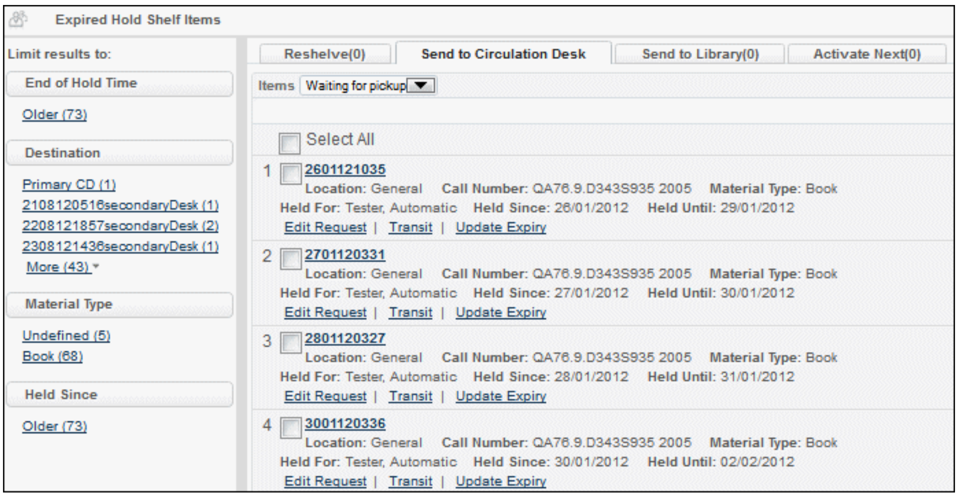


Figure 74: Expired Hold Shelf Items Page - Send to Circulation Desk Tab

To send an item to another circulation desk, click the **Transit** link beneath the item or, to send multiple items, select the check boxes of the relevant items and click **Transit**. A transit slip is printed and the item is put in transit.

- **Send to Library**

  Lists all requests for items belonging to a different library or that are requested for pickup at another library.

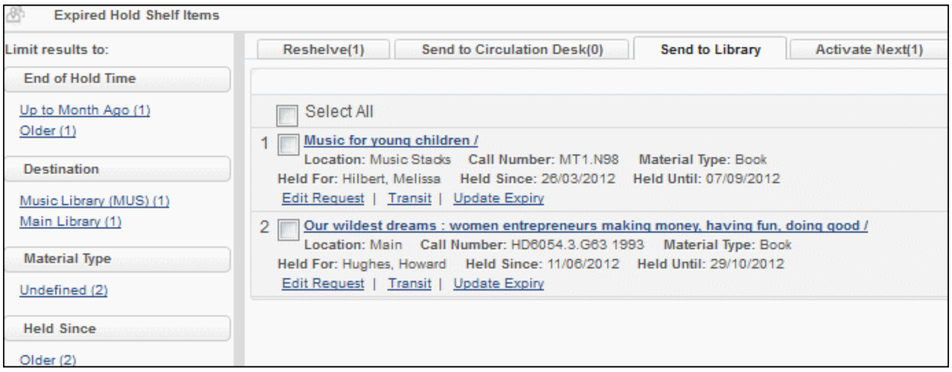


Figure 75: Expired Hold Shelf Items Page - Send to Library Tab

To send an item to another library, click the **Transit** link beneath the item or, to send multiple items, select the check boxes of the relevant items and click **Transit**. A transit slip is printed and the item is put in transit.

- **Activate Next**

  Activates the next request in the queue, which cancels the first request and makes the item available to the next requester.

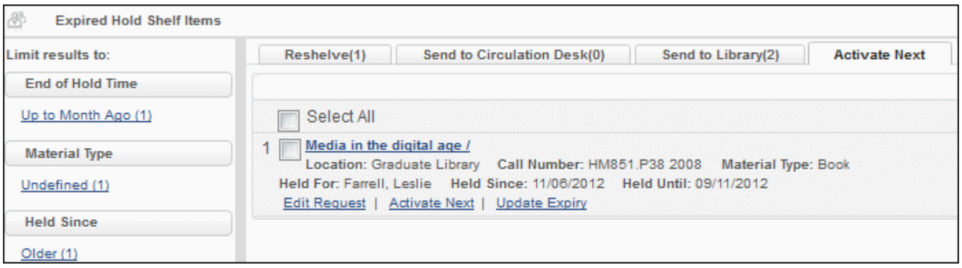


Figure 76: Expired Hold Shelf - Activate Next Tab

To make an item available to the next patron, click the **Activate next** link beneath the item or, for multiple items, select the check boxes of the relevant items and click **Activate next**. The following occurs:

- A cancellation message is sent to the current requester, and the request is deleted.
- The item is placed on the active hold shelf for the next patron who has requested this item.

- A call slip is printed for the item with the new requester's details.

To edit an item in any tab, click the item number or the **Edit request** link beneath the item. The Create Request page is displayed, where you can edit the fields described in **Table 1**.

To update the request expiration date for an item in any tab, click the **Update expiry** link beneath the request and modify the expiration date in the Update Expiration Date dialog box**.**

Digitization Processing

PERMISSIONS:

To manage the digitization of an item, you must have the following role:

- Work Order Operator

To approve a digitization request, you must have the following role:

- Fulfillment Services Manager

A patron or staff member can request the creation of a digital file for any physical item. The physical item is transferred from its library location to the digitization department, where it is scanned and a digital file is created. The digital file is delivered to one of the following:

- Institution – The digital file is owned and managed by the institution as part of the repository.
- Patron – The patron receives the digital file in an email.

You can request full or partial digitization. Partial digitization limits the request to a chapter, page range, or article.

Electronic items are digitized by locating an electronic item in the Alma repository and saving it in digital format (see **Digitizing Electronic Items** on page **108**).

This section describes:

Digitization Department Workflow

The following is an illustration of a typical digitization department workflow from the arrival of a physical item, through the creation of its digital file, to delivery of the digital file.

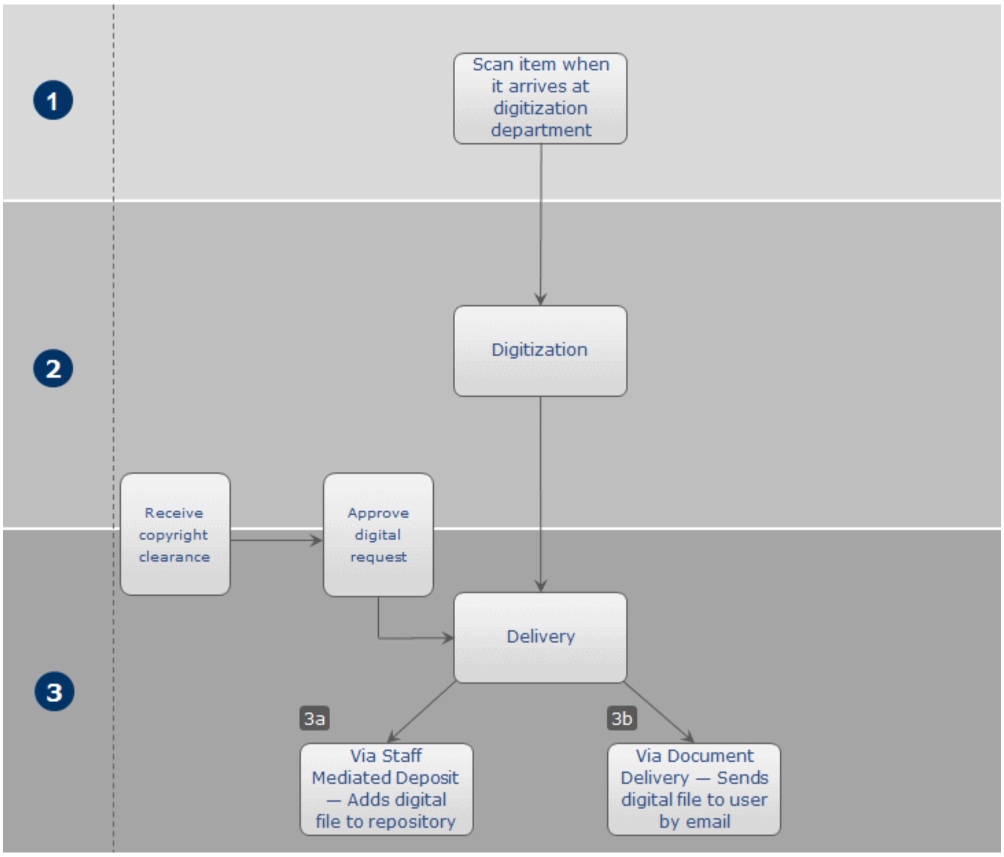


Figure 77: Digitization Workflow

The following is a detailed description of the steps within this workflow (the numbers correspond to the numbers in the diagram):

1 The workflow commences when the requested physical item arrives at the digitization department and its barcode is scanned (see **Scanning Items** on page 84). For information on requests to digitize physical items, see **Creating a Request from the Institution** on page 13.

Upon arrival of the physical item, the digitization request is sent for review to determine whether there are elements that require special attention based on the review rules preconfigured by an administrator. These include:

- Copyright clearance – If required, the library receives a copyright license (from Copyrights Clearance Center Services) to re-use copyright-protected content.

- Approve – The request is approved and the digitization process continues.
- Reject – The request is rejected. The reason for rejection is specified.

NOTES:

- Approval of a digitization request can take place at any point in the digitization workflow, but must be before the Delivery stage. For details on approving/rejecting a request, see **Approving/Rejecting a Request for Digitization** on page **104**.
- Notification to the requester is withheld until the request is approved.

2 The item is digitized (see **Digitizing Physical Items** on page **107**).

3 The request proceeds to the delivery stage of the workflow (see **Delivery of Digitized Items** on page **110**). Delivery is handled in one of the following ways:

  a Via Staff Mediated Deposit – The digital file is delivered to an institution, added to the repository and may be requested by patrons (see **Depositing a Digital File in the Alma Repository** on page **113**). The digital file can be searched in the Primo application.

  b Via Document Delivery – An email is sent to the requesting patron with a link to the digital file (see **Attaching Digitized Items To Be Sent To a Patron** on page **115**).

NOTES:

- The delivery method is defined by preset rules (see **Configuring Digitization Profile Rules** on page **340**).
- An email is not sent to the requester if the request requires approval and the approval process has not been performed (see **Approving/Rejecting a Request for Digitization** on page **104**).

Approving/Rejecting a Request for Digitization

PERMISSIONS:

To approve digitization, you must have the following role:

- Fulfillment Services Manager

The following step is performed only if the digitization rules preconfigured by an administrator determine that approval or Copyright Clearance (CC) is required (see **Configuring Digitization Profile Rules** on page **340**).

Digitization requests can be approved at any point in the digitization workflow, but delivery cannot be completed until approval is granted.

To approve/reject a request for digitization:

1. On the Approval Requests List page (**Fulfillment > Resource Requests > Approve Digitization Requests**), click **Work on** beneath the item you want to approve. The Approval Requests List page opens, displaying details of the item.

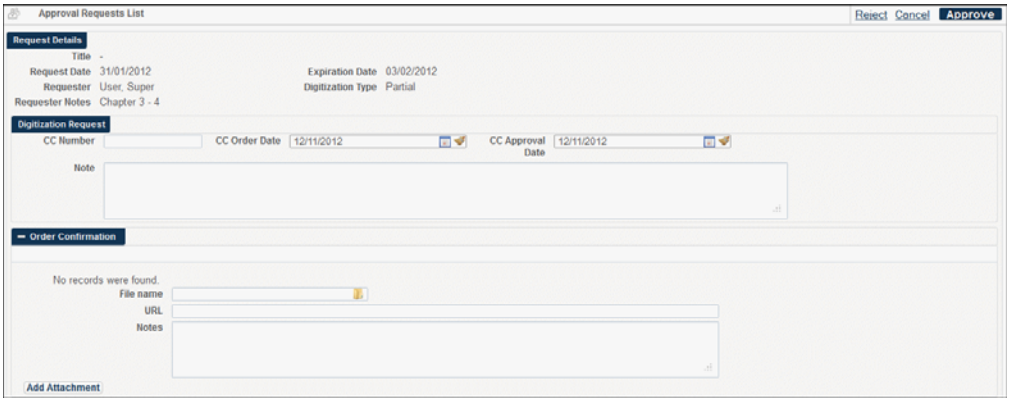


Figure 78: Approval Requests List Page

2. Modify the necessary fields, as described in the following table:

Table 8. Approval Request Fields

Section	Name	Description
Digitization request	CC number	The Copyright Clearance Center number (mandatory if the request requires copyright clearance). The number indicates that the library has a license to use copyright-protected content.
	CC order date	The date the CC was ordered (mandatory if the request requires copyright clearance)
	CC approval date	The date the CC was approved (mandatory if the request requires copyright clearance)
	Note	User notes

Table 8. Approval Request Fields

Section	Name	Description
Order Confirmation	File name	Name of the Copyright Clearance Center confirmation file
	URL	URL with additional order information
	Notes	Order notes

3 If attachments are displayed in the Order Confirmation section, you can click **Actions** to perform the relevant action on the item:

- **Edit** – Opens the Attachments page, enabling you to add another attachment
- **Delete** – Deletes the item
- **Download** – Downloads the item

4 Approve or reject the digitization request:

- Click **Approve** to approve the digitization request and complete the digitization process:
  - If the delivery method selected was **Attach Documents**, an email notification letter is sent with a link to the digital file. The patron receives the digital file as an email attachment. The following is an example of the notification letter.

ExLibris

Notification Item Letter 07/09/2011

User Super
1 Bills Dr.
Fourth Flour - Office 201
Orchard Park 10203
NY USA

asd
ads

Your request to create a digital version of the following material has been completed.
Reform and Reformation--England, 1509-1558 /
By: Elton, G. R. (**Book**)Harvard University Press,Cambridge, Mass. :1977)

Material:

Reform and Reformation--England, 1509-1558 /

Sincerely,
Digitization Department

Main Library

Figure 79: Notification Item Letter for Digital File

  - If the delivery method selected was **Staff Mediated Deposit**, the digital file is made available in the repository under the same title as the physical item, and can then be requested by a patron.

NOTES:

For additional information on the approval request, refer to the warning displayed on the page (next to the heading **Warning:**). The available warnings are:

- Title is waiting for copyright clearance
- Title is waiting for approval
- Title has X previous approval requests that were rejected

- Click **Reject** to reject the request. On the Rejection Request page, select a reason from the **Reason** drop-down list, enter any notes in the **Notes** field, and click **Submit**. The approver's decisions are saved for the digital file.

NOTE:
If the request is rejected, the digital file is not created and the requester is notified that the request was rejected.

Digitizing Physical Items

You can move the physical item from its permanent location in the institution to the digitization department and create a digital file. Before digitizing items, you must ensure that the **Currently at** field at the top of the page displays a digitization department.

Digitization is configured on the Items In Department page.

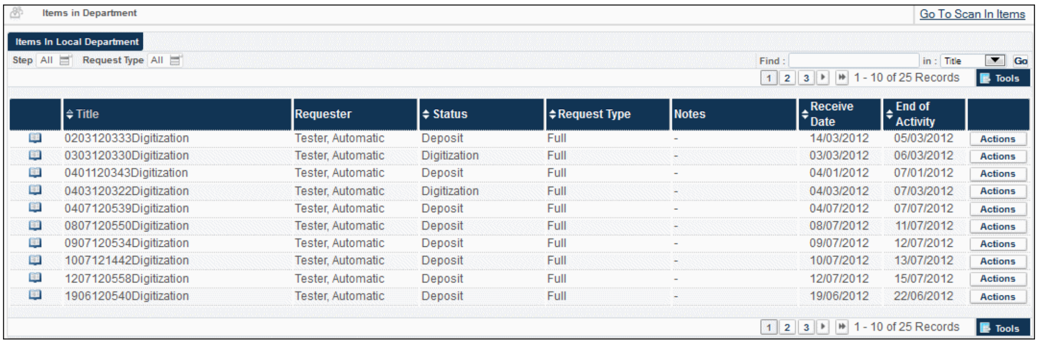


Figure 80: Items in Department Page

NOTES:

- The Items in Department page can also be accessed via the Scan In Items page (**Fulfillment > Resource Requests > Scan In Items**) by clicking **Go**

To Manage Department Items. For details on the Scan In Items page, see **Scanning Items** on page **84**.

- You can open the Scan In Items page from the Items in Department page by pressing **Ctrl + Alt + S** on your keyboard.

The Items in Department page displays patron and/or library work order requests, depending on the option you select in the Request filter (**Library Requests**, **Patron Requests**, **Patron and library requests**, or **All**). The type of requests display in the **Request** column as a link. Click the link to open the Resource Request Monitoring page with a list of the indicated requests.

To digitize physical items:

1. From the Items in Department page (**Fulfillment > Resource Requests > Manage In Process Items**), locate an item with the **Digitization** status.
2. Ensure that the item has been scanned into Alma.
3. Select **Actions > Next Step** for the relevant item. The status changes to **Deposit** or **Document Delivery**, depending on the digitization configurations (see **Configuring Digitization Departments** on page **335**).

NOTE:
Actions > Next Step is displayed only when the current status is **Digitization**.

For details on delivery of digitized items, see **Delivery of Digitized Items** on page **110**.

Digitizing Electronic Items

You can move an electronic item from its permanent location in the institution to the digitization department and create a digital file. Before digitizing items, you must ensure that the **Currently at** field at the top of the page displays a digitization department.

To digitize electronic items:

1 On the Repository Search page (**Resource Management > Search and Sets > Repository Search**), perform a search and locate an item whose **Availability** is **Electronic version**.

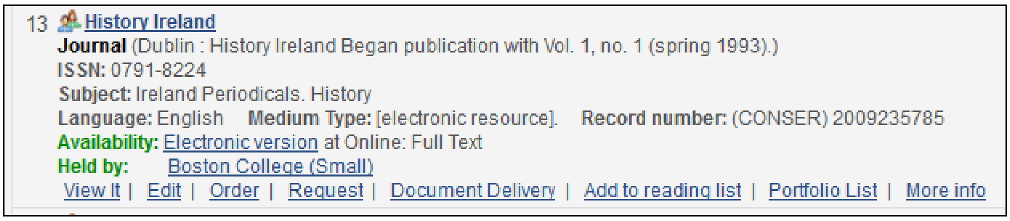


Figure 81: Repository Search Result – Electronic Version

2 Click **Document Delivery**. The Create Request page opens.

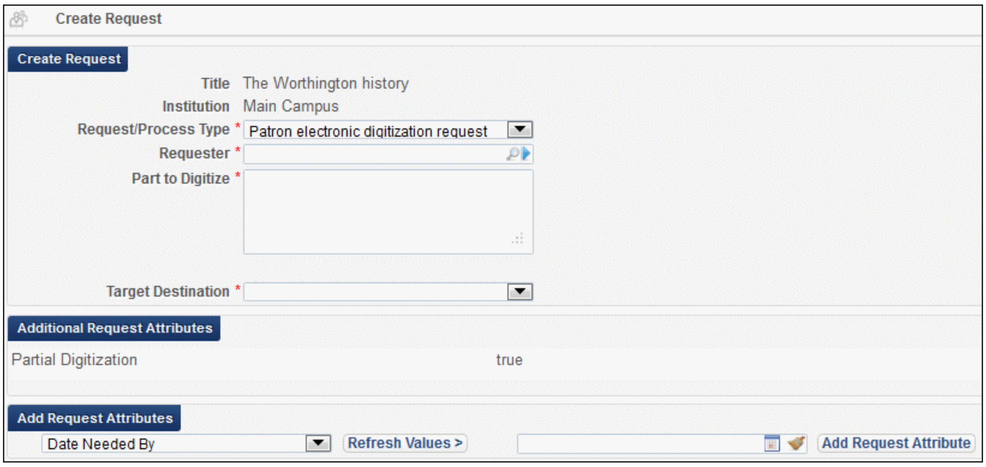


Figure 82: Create Request Page – Electronic Item to Digital

The **Request/process type** field value is **Patron electronic digitization request**.

3 In the **Requester** field, search for the user who is requesting the digitized item.

4 In the **Part to digitize** field, enter the part of the item that you want to be digitized (in free text).

5 In the **Target destination** field, select a department in which digitization is to take place.

6 Optionally, in the **Add Request Attributes** section, add the **Date Needed By** attribute by selecting a date by which the request is needed.

7 Click **Submit**. The digitization request is submitted, and a message displays at the top of the Repository Search page, indicating that the request submitted successfully.

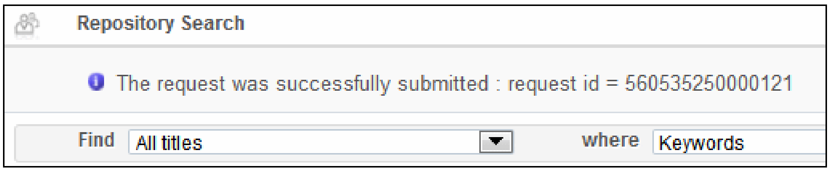


Figure 83: Digitization Request Submission

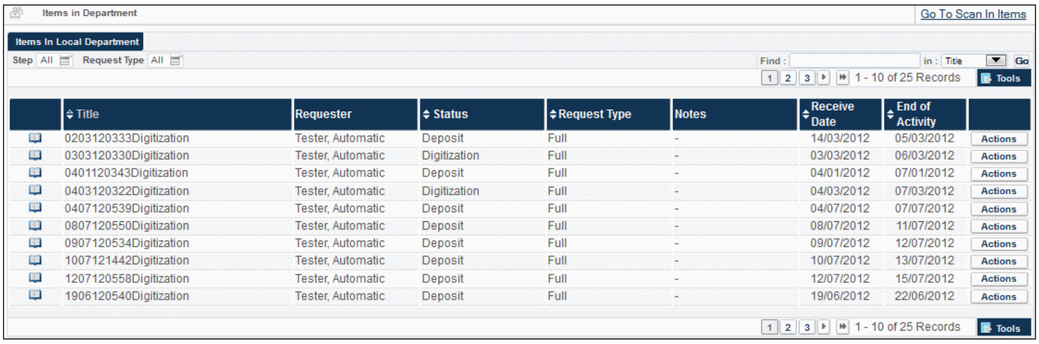
The digitization request displays on the Items in Department page (**Fulfillment > Resource Requests > Manage In Process Items**; see **Figure 80**), where you select **Actions > Next Step** for the relevant item. The status changes to **Deposit** or **Document Delivery**, depending on the digitization configurations (see **Configuring Digitization Departments** on page **335**), and the digitization process continues with the delivery stage (see **Delivery of Digitized Items**, below).

NOTE:
Actions > Next Step is displayed only when the current status is **Digitization**.

Delivery of Digitized Items

After digitizing physical items (see **Digitizing Physical Items** on page **107**) or electronic items (see **Digitizing Electronic Items** on page **108**), you send the digital file to the requester or deposit it in the institution. Before performing digitization delivery, you must ensure that the **Currently at** field at the top of the page displays a digitization department.

Delivery of digitized items is configured on the Items In Department page.



	Title	Requester	Status	Request Type	Notes	Receive Date	End of Activity	
	0203120333Digitization	Tester, Automatic	Deposit	Full	-	14/03/2012	05/03/2012	Actions
	0303120330Digitization	Tester, Automatic	Digitization	Full	-	03/03/2012	06/03/2012	Actions
	0401120343Digitization	Tester, Automatic	Deposit	Full	-	04/01/2012	07/01/2012	Actions
	0403120322Digitization	Tester, Automatic	Digitization	Full	-	04/03/2012	07/03/2012	Actions
	0407120539Digitization	Tester, Automatic	Deposit	Full	-	04/07/2012	07/07/2012	Actions
	0807120550Digitization	Tester, Automatic	Deposit	Full	-	08/07/2012	11/07/2012	Actions
	0907120534Digitization	Tester, Automatic	Deposit	Full	-	09/07/2012	12/07/2012	Actions
	1007121442Digitization	Tester, Automatic	Deposit	Full	-	10/07/2012	13/07/2012	Actions
	1207120558Digitization	Tester, Automatic	Deposit	Full	-	12/07/2012	15/07/2012	Actions
	1906120540Digitization	Tester, Automatic	Deposit	Full	-	19/06/2012	22/06/2012	Actions

1 2 3 1 - 10 of 25 Records Tools

Figure 84: Items in Department Page

NOTE:

The Items in Department page can also be accessed via the Scan In Items page (**Fulfillment > Resource Requests > Scan In Items**) by clicking **Go To Manage Department Items**. For details on the Scan In Items page, see **Scanning Items** on page **84**.

To deliver digitized items:

1. Perform the digitization process, as described in **To digitize physical items:** on page **108**.
2. For items with a status of **Deposit**, select **Actions > Staff mediated deposit** to open the Deposit Activities page. This enables a wizard which configures the digitized item to be deposited in the institution (see **Depositing a Digital File in the Alma Repository** on page **113**).

   For items with a status of **Document Delivery**, select **Actions > Attach documents** open the Attachments page and attach digitized items to be sent to the requesting patron (see **Attaching Digitized Items To Be Sent To a Patron** on page **115**).

   You can also choose from the following options on the **Actions** menu:

   - **Edit** – The Request Management page opens.

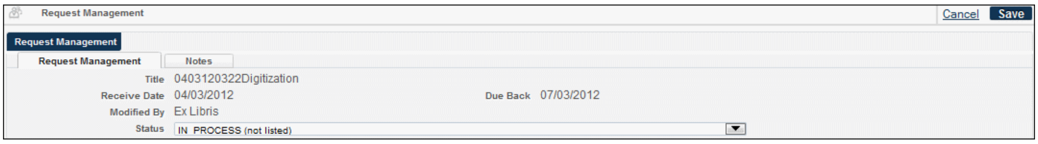


Figure 85: Request Management Page

   - Optionally, in the **Status** field, select a status from the drop-down list. You can also click the **Notes** tab to view or add a note.
   - To add a note, type your note in the **Note** field and click **Add**. The note is displayed in the list of notes on the page.

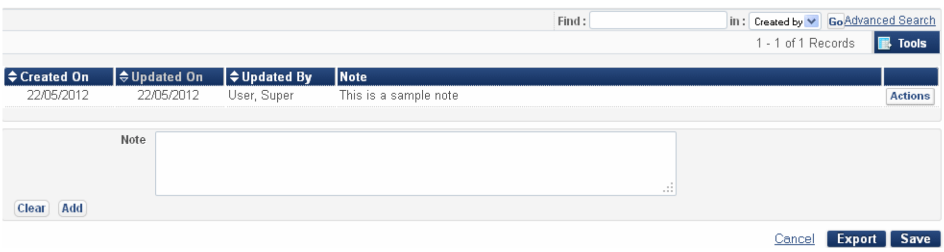


Figure 86: List of Notes - Notes Tab

- To edit a note, select **Actions > Edit** for the note that you want to update, modify the note on the Edit Note page, and click **Save.**
- To delete a note, select **Actions > Delete** for the note that you want to delete and click **Confirm** in the Confirmation Message pop-up window.
- To locate a note in the list of notes, enter the text for which you want to search in the **Find** box and select the field—**Created by**, **Updated by**, or **Note**—in which you want to search for this text.

NOTE:

The icon on the Notes tab indicates that information is available in the tab. The icon on the Notes tab indicates that there is no information in the tab.

- **Cancel request** – The Confirm Request Cancellation page opens.

Figure 87: Confirm Request Cancellation Page

a. In the **Cancellation reason** field, select a reason for cancellation from the drop-down list.
b. In the **Cancellation note** field, add a note on the cancellation as needed.
c. Click **Confirm**.

- **Change to Electronic Digitization** – Enables changing the digitization of a physical item to digitization of an electronic item. Can be changed only when there is an electronic item in the inventory that can fulfill the request.
- **Change to Physical Digitization** – Enables changing the digitization of an electronic item to digitization of a physical item. Can be changed only when there is a physical item in the inventory that can fulfill the request.
- **View it** – The UResolver Screen page opens, displaying resources for the item. This option is displayed only if the item is configured for electronic digitization.

Figure 88: UResolver Screen Page

Depositing a Digital File in the Alma Repository

The Deposit Activities Wizard enables you to create a digital file that is deposited within the institution. The wizard opens when you select **Actions > Staff Mediated Deposit** for an item.

To deposit a digital file into the institution:

1 In the Deposit Activities Wizard (**Actions > Staff Mediated Deposit** from the Items in Department page), click **Add Deposit Activity**. The Type of Material page opens, which is the first page of the Deposit Activities wizard.

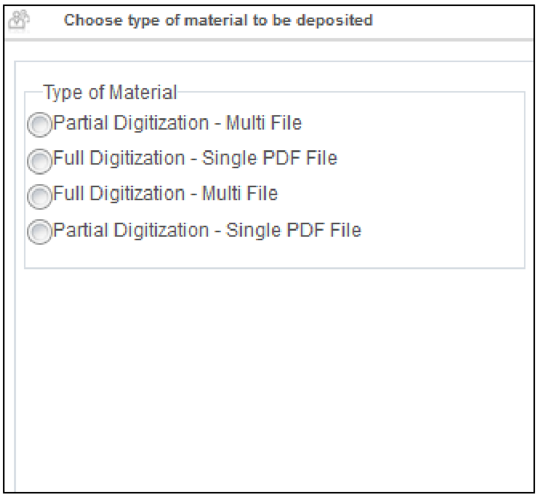


Figure 89: Type of Material Page

2 In the **Type of Material** area, select one of the following:

- **Partial Digitization - Multi File** – Partial digitization of physical resources that are scanned in multiple files
- **Full Digitization - Single PDF File** – Full digitization of a physical resource that is scanned in a single PDF file

- **Full Digitization - Multi File** – Full digitization of physical resources that are scanned in multiple files
- **Partial Digitization - Single PDF File** – Partial digitization of a physical resource that is scanned in a single PDF file

Click **Next**. The Descriptive Information page opens.

Figure 90: Descriptive Information Page

3. In the **Request ID** field, enter the request identification number (mandatory).
4. Optionally, enter the title of the physical resource being digitized and any notes.
5. Click **Next**. The Assertion of Copyright page opens.

Figure 91: Assertion of Copyright Page

6. Click **Next** (**Registered user** is selected by default). The Upload Files page opens.

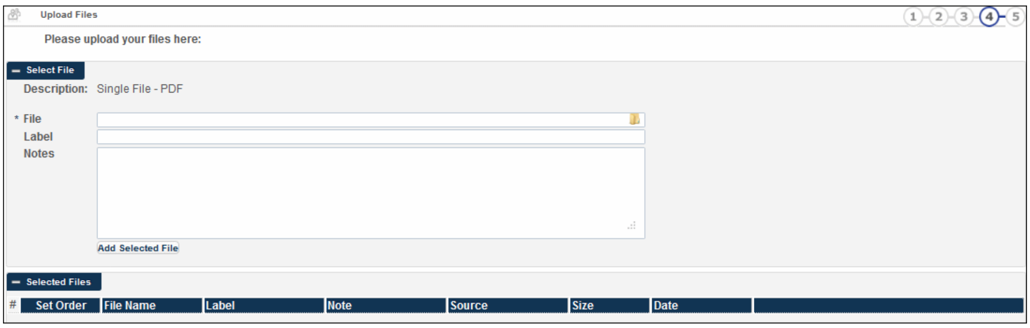


Figure 92: Upload Files Page

7. Click **Browse** and select the digital file. Optionally, add a label and notes in the relevant fields.

8 Click **Add Selected File**. The file details display in the **Selected Files** area. If required, click the **Edit** or **Remove** link.

9 Click **Next**. The Summary of Deposit page opens.

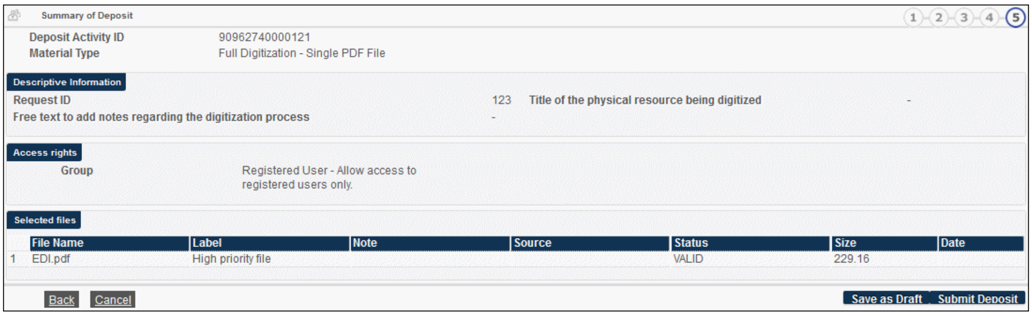


Figure 93: Summary of Deposit Page

10 Verify that the information is correct and click one of the following:

- **Save as Draft** – Saves the information for future use
- **Submit Deposit** – Submits the deposit

NOTE:

An email is not sent to the requester if the request requires approval and the approval process has not been performed (see **Approving/Rejecting a Request for Digitization** on page **104**).

Attaching Digitized Items To Be Sent To a Patron

You attach documents to be sent to the requesting patron on the Attachments page. The Attachments page is visible when you select **Actions > Attach Documents** for an item on the Items in Department page.

- To add an attachment, click **Browse** in the **File name** field and select a file. Add a URL and/or note, if required, and click **Add Attachment**. The attachment is displayed in the list of attachments in the Attachments tab.

Figure 94: List of Attachments - Attachments Tab

- To edit an attachment, select **Actions** > **Edit** for the attachment that you want to update, modify the **File name**, **URL**, and **Notes** fields as required, and click **Save Attachment**.
- To delete an attachment, select **Actions** > **Delete** for the attachment that you want to delete and click **Confirm** in the Confirmation Message pop-up window.
- To download a file, select **Actions > Download** for the file that you want to download, specify the folder to which you want to save the file, and click **OK**.

NOTE:

The icon on the Attachments tab indicates that information is available in the tab. The icon on the Attachments tab indicates that there is no information in the tab.

A message is displayed if the limit of the total digital file size has been reached.

5

Resource Sharing

This section includes:

Resource Sharing Workflow

The following is an illustration of the resource sharing requests workflow that governs the way resource sharing libraries manage the borrowing and lending process. The workflow outlines the tasks of both the borrowing and lending institutions in this process.

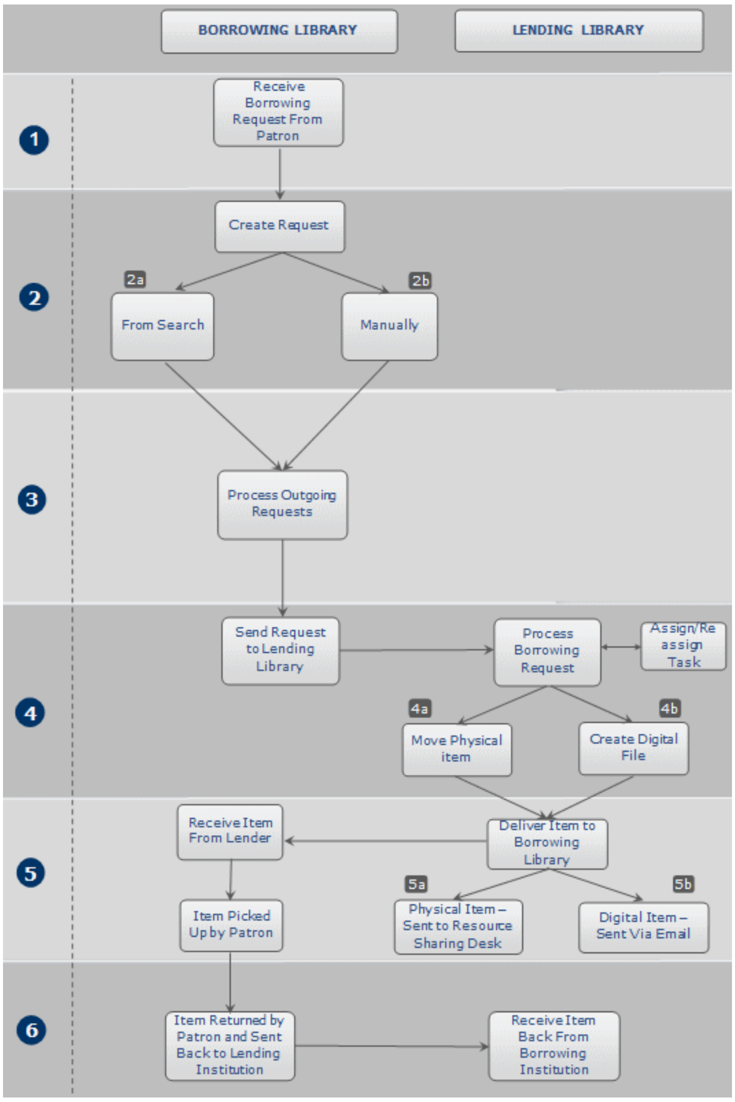


Figure 95: Resource Sharing Requests Workflow

The following is a detailed description of the steps within this workflow (with the numbers corresponding to the numbers in the diagram):

1 The Fulfillment Services Operator receives notification about a borrowing resource sharing request for a patron.

2 The Fulfillment Services Operator creates resource sharing requests:

   a from a staff search (see **Using the Persistent Search Box** in the *Alma Resource Management Guide*)

   b from a blank form (see **Manually Adding a Request** on page **135**)

   c from an NCIP request

3 The request is processed by the Fulfillment Services Operator or Fulfillment Services Manager, both of whom can perform the following activities on the request:

- **Edit** – See **Editing a Borrowing Request** on page **146**.
- **View** – Displayed only when the request is completed. Enables viewing information on the request.
- **Remove** – Removes the request from the system.
- **Cancel** – Cancels the request, depending on the configured partner:
  - No partner – The request is completed.
  - NCIP partner – A note is added to the request in the Notes tab indicating that the request has been canceled.
  - ARTEmail partner – A cancellation email is sent to the partner if the **cancel** keyword is supported by the partner and the item's workflow has not yet begun.
- **Duplicate** – Creates a new request based on the existing one. The Resource Sharing Borrowing Request page opens, where you modify the request parameters in the Resource Information and Request Attribute sections, as needed (see **Table 10** and **Table 13**).
- **Send** – Displayed only for borrowing requests with an ARTEmail or ISO partner. Opens the Parameters tab of the Resource Sharing Borrowing Parameters page, where you configure parameters and can send an ARTEmail or ISO order to the partner (see **Sending a Borrowing Request** on page **152**).
- **Send Query to Patron** – Displayed only for borrowing requests. Depending on the configured patron query templates settings (see **Configuring Patron Query Templates** on page **378**), one of the following occurs:
  - If there is only one template and **Edit if Single = True** – Opens the E-mail Message dialog box, where you configure a message to be sent to the patron via e-mail.

Figure 96: E-Mail Message Dialog Box

The **Subject** field contains the text ***Your request***, followed by the External Identifier of the request (if one exists).

The **Body** field contains text relating to the requested resource. You can update the text in this field, as needed. Enter the text for the patron by replacing the string ***[please enter your query here]*** under ***Query to patron:***

Modify the contents of the email message as needed, and click **Send E-Mail**.

The actions that can be performed on this page are determined by the status of the request, and the workflow profile configured for the partner. For details on configuring workflow profiles, see **Configuring Workflow Profiles** on page **361**.

For details on borrowing resource requests activities, see **Managing Resource Sharing Borrowing Requests** on page **128**.

- If there is only one template and **Edit if Single = False** – Sends the query immediately.
- If there is more than one template – The Select Email Template dialog box opens, where you select the template you want to use.

Figure 97: Select E-Mail Template Dialog Box

Click **Open for Edit** to edit the contents of the message before sending it, or click **Send Email** to send the query immediately, without editing its content.

4 The request is sent to the lending library, where the operator processes the request/task by performing internal library procedures to make the required resource available:

- For a physical item request, the process is the same as a temporary move request. However, the target destination is the resource sharing library (see **Moving Items** on page **94**).
- For a digital item request, the process is the same as a digitization request. The target destination is a digitization department (see **Digitization Processing** on page **102**).

NOTE:
The operator can edit or cancel the request. The task can also be assigned or reassigned to another Fulfillment Services Operator.

5 The requested item is sent to the borrowing institution, where it is received by the resource sharing partner.

- A physical item is sent to the resource sharing desk at the other institution.
- A digital file is sent by email to the resource sharing desk at the other institution.

The Requests Operator scans in the external request ID (see **Scanning Items** on page **84**). During the scanning process, the Requests Operator is requested to input the temporary barcode for the item.

A temporary item is created and sent to the desired pickup location, where the Resource Sharing Library Operator/Manager is notified about the next action, which is one of the following:

- Place the item on the hold shelf
- Move the item to another library

The patron picks up the requested item.

6 The loaned item is returned by the patron and scanned into the system (see **Scanning Items** on page **84**) using either the item's barcode or the temporary barcode created when the item was received from the resource sharing partner. The item is then sent back to the resource sharing partner. The item can also be scanned into the system by selecting the **Return** link on the Resource Sharing Borrowing Requests page (see **Table 9**).

The external institution returns the requested item. Upon receipt of the item from the external institution, the item or the external request ID is scanned into Alma (see **Scanning Items** on page **84**). The scanning process informs you of the location to which the returned item must be sent.

VIDEO:

For more information on resource sharing, see the *Resource Sharing* video (1 hour 12:31 mins). For detailed Ask the Expert sessions on resource sharing, see *Resource Sharing Setup and Workflows – Part 1* and *Resource Sharing Setup and Workflows – Part 2*.

Working with Relais (NCIP) Resource Sharing Systems

This section describes the sample workflows for submitting resource sharing requests via a Relais broker. The workflows describe the procedure for checking out an item, as well as checking in an item.

You submit a resource sharing request to a Relais broker in one of the following ways:

- Using Primo, PC, or Google Scholar (with complete metadata) or via citation linker (with incomplete metadata). The request is then sent to and accepted by Relais.
- Using Relais directly. You log into Relais, perform a search and submit a request. You must then check that the resources' availability in Alma is accurately reflected in Relais.

For additional details on NCIP based integration for resource sharing requests, see https://developers.exlibrisgroup.com/alma/integrations/ncip/broker_resource_sharing.

Relais (NCIP) Workflow – Item Checkout

The checkout process starts with the lending library receiving a new request, viewable in the Relais system. The operator gets the requested item, and starts the checkout process that is described below.

The following is an illustration of the resource checkout workflow when a resource sharing request is submitted via a Relais broker:

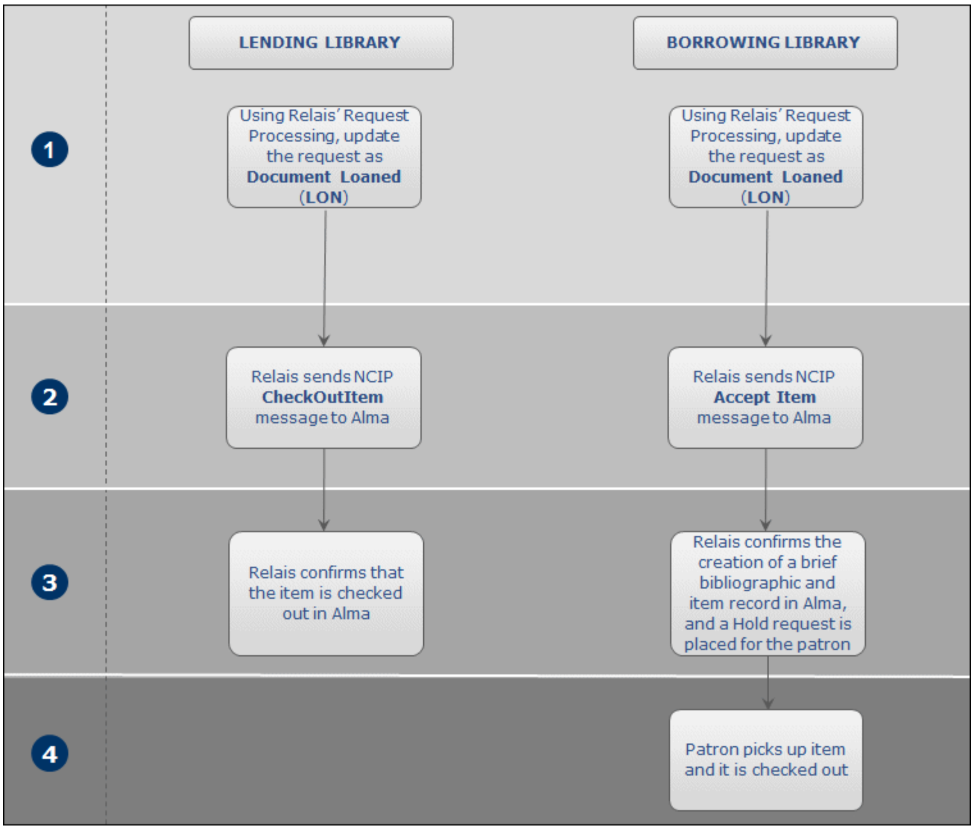


Figure 98: Item Checkout – Relais Broker

The following is a detailed description of the steps within this workflow (with the numbers corresponding to the numbers in the diagram).

The following steps occur at the lending library (displayed on the left side of the diagram) after a resource sharing request resource is shipped:

1 Relais updates the request status to **Document Loaned (LON)**.

2 Relais sends an NCIP **CheckOutItem** message to Alma.

3 Relais confirms that the item is checked out in Alma.

The following steps occur at the borrowing library (displayed on the right side of the diagram) after a resource sharing request resource is received:

1 Relais updates the request status to **Document Loaned (LON)**.

2 Relais sends an NCIP **Accept Item** message to Alma.

3 Relais confirms that a brief bibliographic and item record is created in Alma, and creates a **Hold** request for the patron.

4 The patron picks up the item and checks it out.

Relais (NCIP) Workflow – Item Check-in

The check-in process starts with the borrowing library returning a borrowed resource the lending library. The operator receives the item from the patron and ships it back to the lending library, activating the check-in process that is described below.

The following is an illustration of the check-in workflow when a resource sharing request is submitted via a Relais broker:

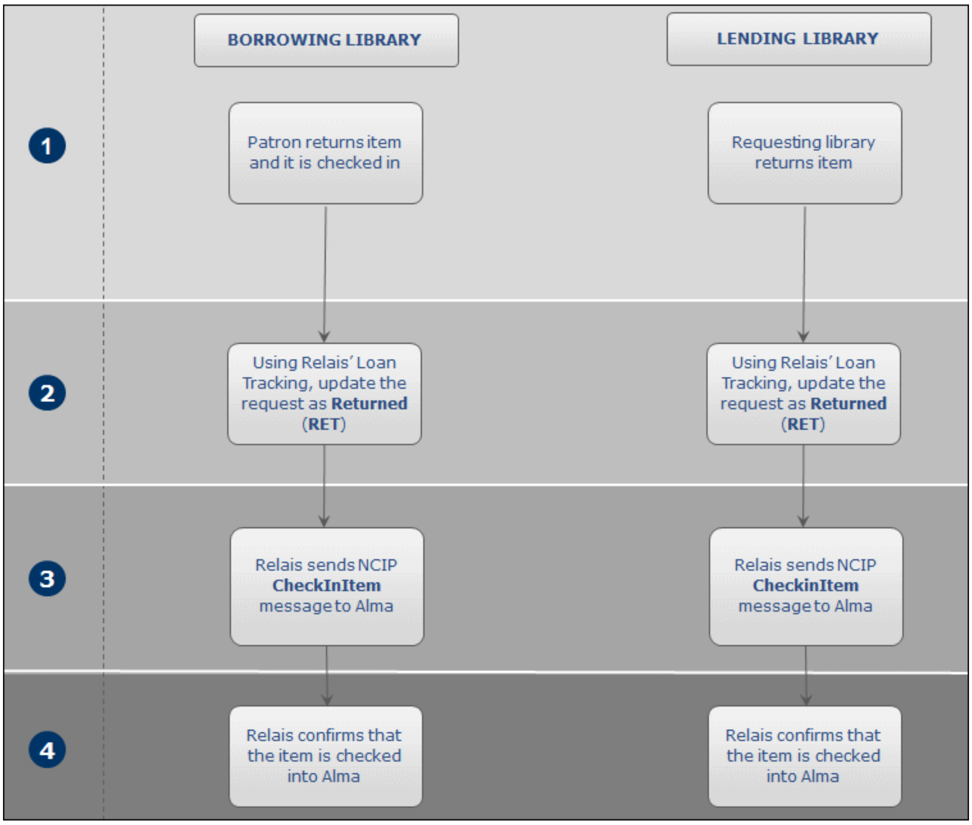


Figure 99: Item Check-in – Relais Broker

The following is a detailed description of the steps within this workflow (with the numbers corresponding to the numbers in the diagram).

The following steps occur at the borrowing library (displayed on the left side of the diagram) when a resource sharing item is shipped back to the lender:

1. The patron returns the item and checks it in.
2. Relais' loan tracking updates the request status to **Returned (RET)**.
3. Relais sends an NCIP **CheckInItem** message to Alma.
4. Relais confirms that the item has been checked in to Alma.

The following steps occur at the lending library (displayed on the right side of the diagram) when a resource sharing item is checked in:

1. The library that requested the item returns it to the lending library.
2. Relais' loan tracking updates the request status to **Returned (RET)**.
3. Relais sends an NCIP **CheckInItem** message to Alma.
4. Relais confirms that the item has been checked in to Alma.

For details on the configuration settings that must be invoked in Alma to enable integration with Relais, see **Configuring Alma/Relais Integration** on page **125**.

Configuring Alma/Relais Integration

Following are the configuration settings that must be invoked in Alma to enable integration with Relais:

1. Define the Resource Sharing Library and the Calendar Management settings to determine a loan's due date (see **Managing Institutions and Libraries** in the *Alma Administration Guide*).

   You can also configure TOU and policies to determine when an overdue fine is to be invoked (see **Configuring Fulfillment Units, Policies and Item Policies, and Terms of Use** on page **273**).

2. Configure a physical location for the resource sharing library, as needed (see **Configuring Physical Locations** on page **265**). Ensure that you select the resource sharing library in the **You are configuring:** drop-down list.

NOTE:
Generally, only one circulation desk is needed. However, multiple circulation desks are required if there is more than one receiving location, in which case you must link the circulation desks to different physical locations. Different users can also be assigned to the various circulation desks through Alma User Roles (see **Managing User Roles** in the *Alma Administration Guide*).

3. Configure a circulation desk (see **Configuring Circulation Desks** on page **249**).

   On the first page of the wizard (**Circulation Desk – General Information**):

   - Leave the **Printing Information** section blank (unless otherwise specified by the institution).
   - In the **Hold Shelf Information** section, select **Has hold shelf** if there is a separate hold shelf for document delivery where patrons are to collect items. Otherwise, do not select this option.

   On the second page of the wizard (**Circulation Desk – Physical Locations**), add the physical location configured in Step **2**, above.

4 Configure the relationships that the resource sharing library has with other libraries in the institution (see **Configuring Fulfillment Relationships** on page **241**).

5 On the Fulfillment Configuration menu (**Fulfillment > Fulfillment Configuration > Configuration Menu**), change the **You are configuring:** drop-down value from the library to the institution.

6 Configure display logic rules to define in which instances the **Resource Sharing** link displays on the UResolver page (see **Configuring Display Logic Rules** on page **380**).

7 Optionally, configure the activities that are to be performed manually in Alma for borrowing and/or lending requests (see **Configuring Workflow Profiles** on page **361**). This may not be necessary, as NCIP generally handles all necessary steps automatically.

8 Update users by assigning roles from the resource sharing library scope. It is recommended to define role templates and then assign the templates to users (see **Configuring Role Templates** in the *Alma Administration Guide*).

9 Configure a resource sharing partner to define the type of communication between Alma and Relais (see **Resource Sharing Requests** in the *Alma Integrations with External Systems Guide*).

When configuring a resource sharing partner, ensure that you have configured the following parameters, as indicated:

On the **General Information** tab:

- **Profile Type**: NCIP
- **System Type**: Relais ILL

On the **Parameters** tab:

- **User identifier type**: Primary Identifier
- **Request pushing method**: Open URL
- **URL template**: https://h7.relais-host.com/xxxx/loginpRFT.jsp?LS=XXXX where **xxxx** and **XXXX** is the code by which the library is identified in Relais
- **Add user auto login to URL**: Yes
- **Enable service for guest user**: Depends on the policy in use; generally, the value is **No**
- **Default library owner**: Resource Sharing Library
- **Bibliographic record ID type**: other_system_number
- **Default location**: <The physical location specified for the resource sharing library>
- **Default item policy**: <The created item policy>

- **Default location**: <The physical location created for the resource sharing library>
- **Receive desk**: <The desk associated with the resource sharing library>
- **Require authentication**: No

10 Define a terms of use (see **Configuring Fulfillment Units, Policies and Item Policies, and Terms of Use** on page 273). Ensure that the **You are configuring:** drop-down displays a resource sharing library. The following terms of use must be defined:

- Loan
- Request
- Borrowing resource sharing: Ensure that **Allow Resource Sharing Requesting = Resource Sharing Allowed**, to enable displaying the Resource Sharing link from Primo to Relais. This TOU is also used to set fees to be charged to specific user groups when an item from a borrowing request is received.

11 Define a fulfillment unit (see **Configuring Fulfillment Units, Policies and Item Policies, and Terms of Use** on page 273). Ensure that the **You are configuring:** drop down displays a resource sharing library.

12 Define a z39.50 server integration profile (see **Configuring Integration Profiles** on page 212).

Configuring Relais

Relais support does the following:

1. Registers the library by configuring an NCIP Server connection.
2. Compiles a list of user groups from Alma with NCIP profile codes matching those in Relais. Support specifies whether the user group supports copies and loans; if loans are supported, the default pickup location for the loan is also specified.
3. Invokes NCIP Unit Library Mapping by compiling a list of Alma library codes mapped to the same Relais library.
4. Ensures that the Alternate Patron Id contains the value of the User identifier type specified in the Alma Partner record (that is, the **Primary Identifier**).
5. Hides the **User Profile** form using Relais Webforms, ensuring that new Relais users cannot see the form when they place a request.

For additional details on Relais configuration, contact Relais Support.

Managing Resource Sharing Borrowing Requests

PERMISSIONS:

To manage resource sharing borrowing requests, you must have one of the following roles:

- Fulfillment Services Operator
- Fulfillment Services Manager

This section describes how to manage resource sharing borrowing requests on the Resource Sharing Borrowing Requests page.

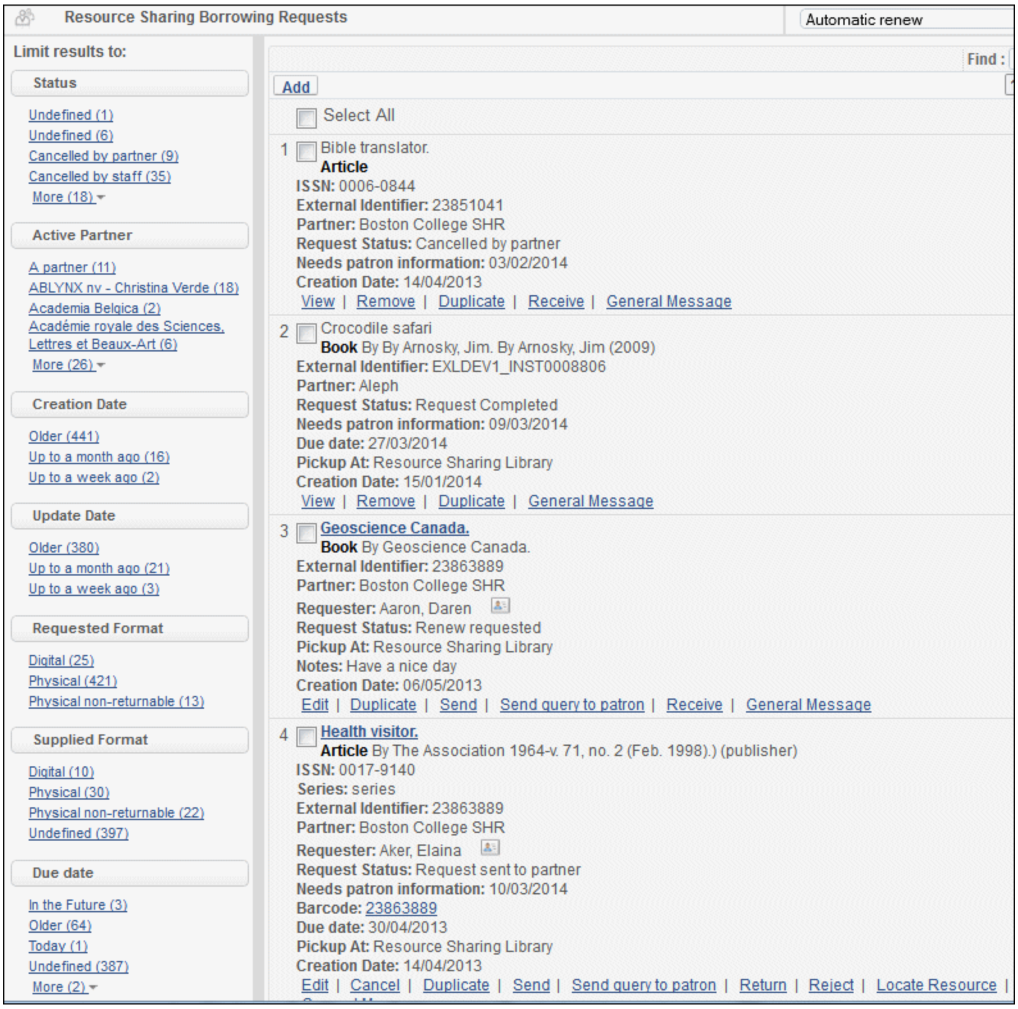


Figure 100: Resource Sharing Borrowing Requests Page

To manage resource sharing borrowing requests:

1. On the Resource Sharing Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**), locate the requests you want to manage. You can locate specific requests using the **Find** box at the top of the list, or via the **Status** and **Partner** filters on the left side of the page.

   You can add a request to the list by clicking the **Add** button and selecting to add an item from a search (see **Adding a Resource Sharing Lending Task From a Search** on page 164) or manually (**Manually Adding a Request** on page 135).

2. To manage a specific request, click the relevant link beneath a request, as described in the following table:

Table 9. Resource Sharing Borrowing Request Page Links

Link	Description
Edit	Modify the request in the Resource Information dialog box (see **Editing a Borrowing Request** on page 146).
View	Enables viewing request information. Displayed only when the request's status is one of the following: ■ Returned item to partner ■ Request completed **NOTE:** The **Request completed** status indicates that the request has either been delivered, or was canceled before it reached the hold shelf. ■ Shipped digitally ■ Cancelled by partner ■ Cancel requested

Table 9. Resource Sharing Borrowing Request Page Links

Link	Description
Remove	Removes the request. Displayed only when the request’s status is one of the following: ■ Returned item to partner ■ Request completed **NOTE:** The **Request completed** status indicates that the request has either been delivered, or was canceled before it reached the hold shelf. ■ Shipped digitally ■ Cancelled by partner ■ Cancel requested
Cancel	Cancels the request. Displayed only when: ■ The request does not have a status of **Loan.** ■ The request’s status is not **Request Completed**. ■ No partner exists or the configured active partner supports the **Cancel** feature. **NOTE:** You can also cancel a request by selecting the check box of the request and clicking **Remove Requests**, or by selecting **Actions > Cancel** for the active partner on the Rota tab. If no other partners are active, the request is canceled. To cancel an active partner, cancelling must be enabled in a partner’s workflow profile. For details on managing rotas, see Step **3** in **Editing a Borrowing Request** on page **146**. You can also delete requests in Primo, via the My Account tab (see **My Account** in the *Alma Integration With Primo Guide*).

Table 9. Resource Sharing Borrowing Request Page Links

Link	Description
Duplicate	Creates a new request based on the existing one. You can then modify the request as required on the Resource Sharing Borrowing Request page. For details on the displayed fields on this page, see **Table 10** and **Table 13**. When duplicating a Resource Sharing Borrowing request, the values in the following fields are copied to the new request: ■ Title ■ ISSN, ISBN (Metadata fields) ■ Author ■ Requester ■ Owner ■ Request Status ■ Requested Format ■ Delivery Location ■ Request Note
Send	Displayed only when an ARTEmail or ISO partner is configured. Opens the Resource Sharing Borrowing Parameters page, where you configure details to be sent to the partner (see **Sending a Borrowing Request** on page **152**). The parameters displayed are those selected for the partner during the partner configuration process (see **Resource Sharing Requests** in the *Alma Integration with External Systems Guide*).
Send query to patron	Depending on the configured patron query templates settings, either opens a dialog box where you configure an email message relating to the request for the patron (see **Figure 96**), or sends the query immediately. For details on system behavior when selecting this option, see Step **3** in **Resource Sharing Workflow**.

Table 9. Resource Sharing Borrowing Request Page Links

Link	Description
Renew	Click to invoke renewal of a resource sharing borrowing request. A dialog box opens, where you enter a due date for the request and an optional note which displays in the **Notes** tab page of the request. The request status is changed to **Renewed by Partner.** This option displays when **Staff renewal** is selected for lending requests in the Resource Sharing Lending Workflow Profile (see **Configuring Workflow Profiles** on page **361**). **VIDEO:** For more information about requesting renewal of a borrowing request, see the *ISO ILL: Request Renewal* video (10:06 mins).
Request renew	Click to request renewal of resource sharing borrowing requests. A dialog box opens, where you enter a due date for the request and an optional note which displays in the **Notes** tab page of the request. If the Resource Sharing Lending Workflow Profile has the **Renewal Response** and **Staff Renewal** options selected, the request status is changed to **Renew Requested**. For details on workflow profiles, see **Configuring Workflow Profiles** on page **361**. **NOTE:** If **Renewal Response** was not selected for the workflow profile, the request is automatically renewed after clicking the **Request renew** link; the request's status is **Renewed by partner**, and the **Renew** link does not appear. This option displays for requests with a **Received** status.
Receive	Opens the Received Items page where you select a receiving format (**Digital** or **Physical**) and enter a temporary barcode to enable receiving the resource (see **Receiving Items** on page **177**). If the **generate_resource_sharing_temp_barcode** configuration setting is set to **true**, the temporary barcode is displayed automatically (see **Configuring Other Settings** on page **406**).

Table 9. Resource Sharing Borrowing Request Page Links

Link	Description
General Message	Enables sending a general message with a borrowing request to a lender (see **Sending a General Message With a Resource Sharing Request** on page **133**).
Reject	Enables marking a request rejected by the lending institution as **Rejected** (see **Rejecting a Borrowing Request** on page **153**).
Return	Displayed for requests that have a status of **Returned by patron** that have not yet been returned to the partner. If the borrowing Workflow Profile for the partner includes the **Lender check in** option, the request status is changed to **Returned item to partner** (see **Configuring Workflow Profiles** on page **361**). **VIDEO:** For more information about the returning items to the lender, see the *ISO ILL: Lender Checked-in Message* video (8:35 mins).

You can perform actions on multiple requests simultaneously via the following buttons:

- **Change Status** – Select the check boxes of the relevant requests, select a status from the drop-down list and click **Change Status**.
- **Remove Requests** – Select the check boxes of the relevant requests and click **Remove Requests**. The requests are removed from the Resource Sharing Borrowing Requests page.

Sending a General Message With a Resource Sharing Request

You can send a general message with a resource sharing borrowing or lending request. The message displays on the request's **General Messages** tab when clicking **Edit** or **View** for the request.

General Messages can be sent only if:

- The request is an ISO request
- The request has already been sent (this limitation is for borrowing requests only)

Additionally, there is a **General Messages** facet, which enables you to filter requests by those containing active general messages.

VIDEO:

For more information about sending a general message with a resource sharing request, see the *ISO ILL: Send General Message* video (2:43 mins).

The following procedure describes sending a General Message with a borrowing request to a lender, but a General Message can be sent from a lending request to a borrower in the same manner.

To send a general message with a Resource Sharing request:

1 On the Resource Sharing Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**), locate an ISO request. The request displays the **General Message** link.

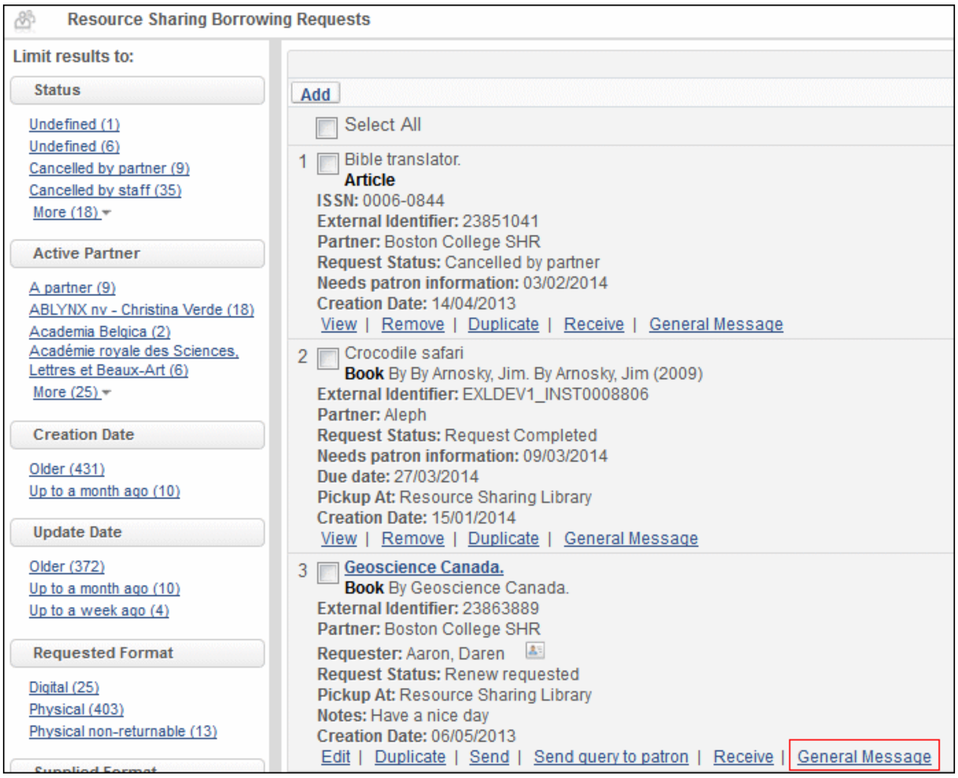


Figure 101: Resource Sharing Borrowing Requests Page – General Message Link

NOTE:

The **General Message** link also appears on the Resource Sharing Lending Requests page for ISO requests.

2 Click **General Message**. The General Message dialog box opens.

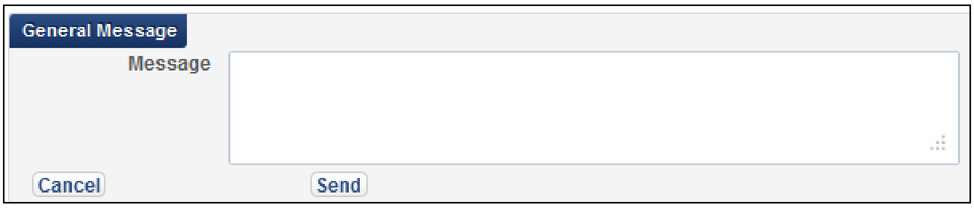
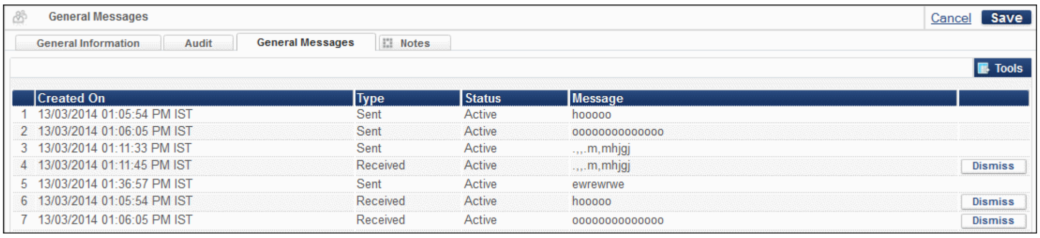


Figure 102: General Message Dialog Box

3 In the **Message** field, enter a message and click **Send**. The message is sent to the lender.

4 On the Resource Sharing Lending Requests Task List page (**Fulfillment > Resource Sharing > Lending Requests**), locate the message with the external identifier belonging to the Borrowing request message, and click **Edit**. The Resource Sharing Lending Request page opens.

5 Click the **General Messages** tab. The General Messages page opens, and the general message sent by the borrower displays in the table with **Type = Received**.



	Created On	Type	Status	Message	
1	13/03/2014 01:05:54 PM IST	Sent	Active	hooooo	
2	13/03/2014 01:06:05 PM IST	Sent	Active	oooooooooooooo	
3	13/03/2014 01:11:33 PM IST	Sent	Active	.,,,.m,mhjgj	
4	13/03/2014 01:11:45 PM IST	Received	Active	.,,,.m,mhjgj	Dismiss
5	13/03/2014 01:36:57 PM IST	Sent	Active	ewrewrwe	
6	13/03/2014 01:05:54 PM IST	Received	Active	hooooo	Dismiss
7	13/03/2014 01:06:05 PM IST	Received	Active	oooooooooooooo	Dismiss

Figure 103: General Messages Tab

6 When the message has been noted or acted upon, click **Dismiss** to remove the message from the page. The **Dismiss** button displays only for messages with **Type = Received**.

You can view requests that have received messages (messages of **Type = Received**) that are active by clicking the **Active General Messages** link in the General Messages facet on the left side of the Resource Sharing Lending Requests Task List or Resource Sharing Borrowing Requests page.

You can also access active general messages by clicking the **Lending requests with active general messages** link on the Tasks list.

Manually Adding a Request

If required, you can manually add a borrowing request.

To add an item manually:

1. On the Resource Sharing Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**), click **Add** and select **Manually**. The Citation Type dialog box opens.

Figure 104: Citation Type Dialog Box

NOTE:
To add a request via search, select **From Search** instead of **Manually** (see **Adding a Resource Sharing Lending Task From a Search** on page **164**).

---

2. In the **Citation type** drop-down list, select one of the following options and then click **Choose**:

   - **Book** – The following page opens:

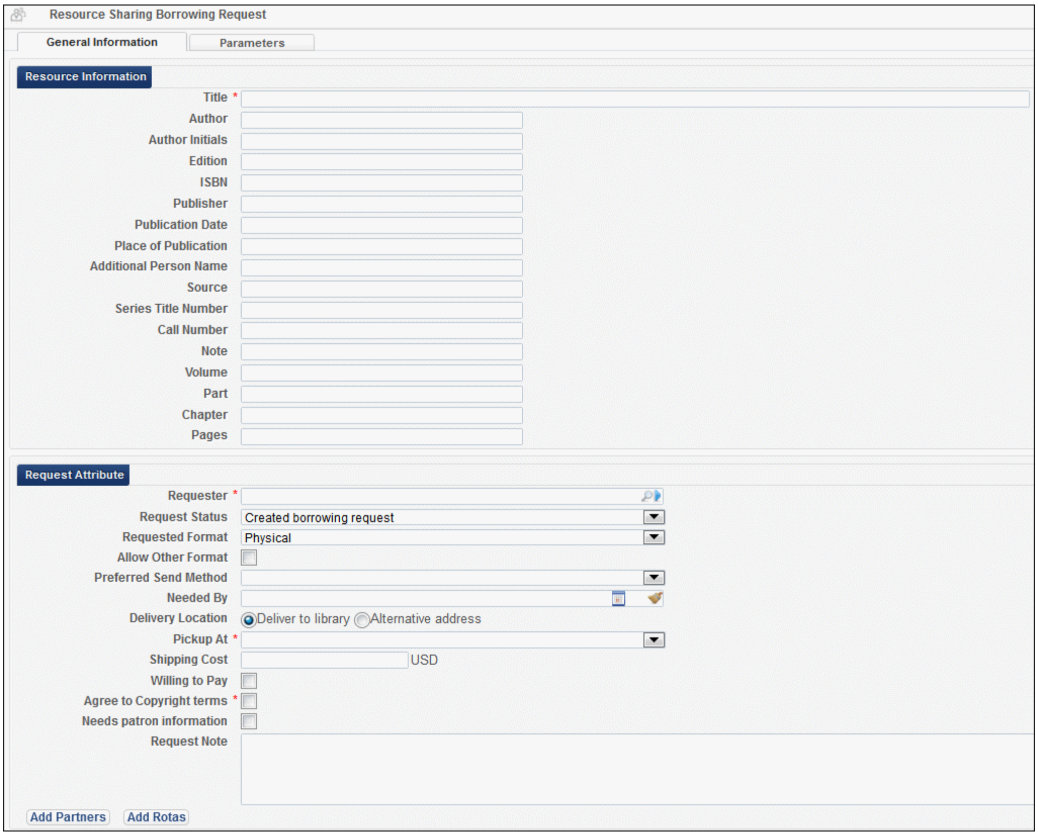


Figure 105: Resource Sharing Borrowing Request Page – After Book Selection

- **Article** – The following page opens:

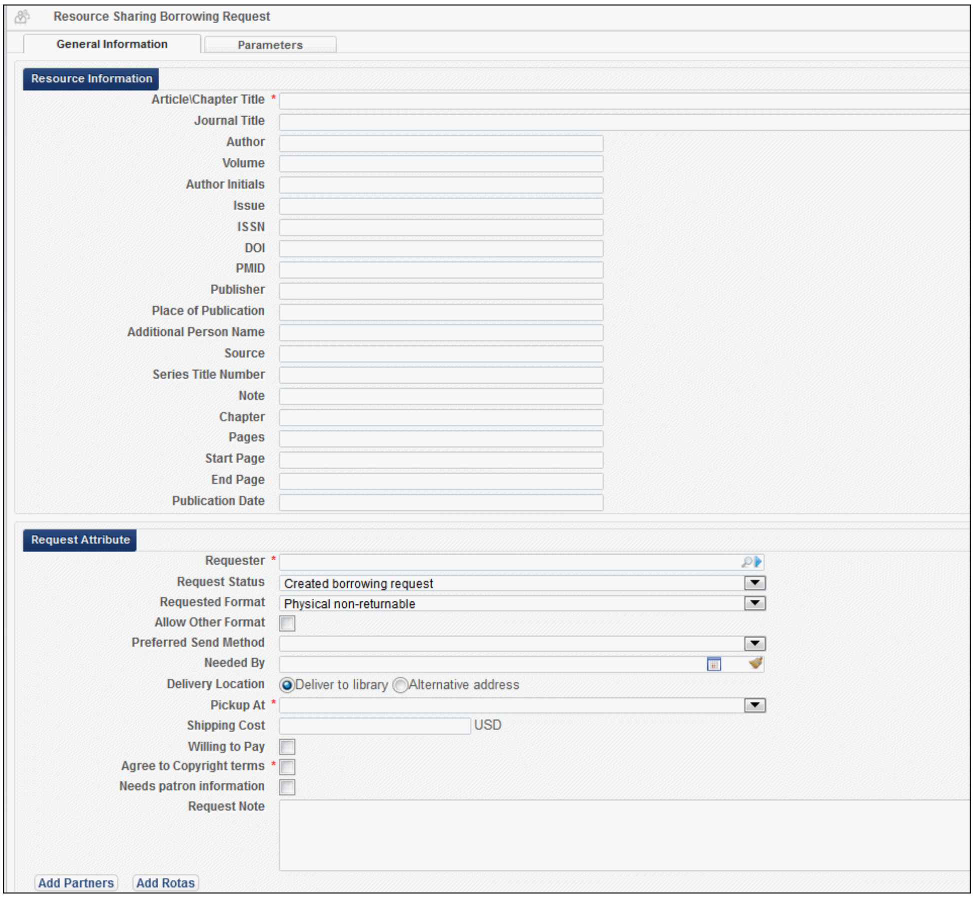


Figure 106: Resource Sharing Borrowing Request Page – After Article Selection

3 In the **Resource Information** area, enter the information in the relevant fields, as described in the following table:

Table 10. Resource Information Fields

Field	Description
Title (Required)	The title of the book. Displayed when adding a book.
Article/Chapter title (Required)	The title of the article or chapter. Displayed when adding an article.
Journal title	The title of the journal that contains the article
Author	The author of the book or article
Author initials	The initials of the author

Table 10. Resource Information Fields

Field	Description
Volume	Volume number of the journal that contains the article
Issue	Issue number of the journal that contains the article
ISBN/ISSN	The International Standard Book Number (ISBN) or International Standard Serial Number (ISSN) that identifies the book or article
DOI	Digital object identifier for the item
PMID	PubMed database ID
Publisher	Publisher of the item
Place of publication	Place in which the book or article was published
Publication date	Date of the book's publication
Additional person name	Name of an additional contact
Source	Source of the item
Series title number	Title number of the series in which the item is located
Call number	Call number of the book. Indicates the library shelf on which the books are located
Note	Enter any notes, as needed
Volume	Volume number of the book
Part	Part number of the book
Chapter	Chapter number in the journal that contains the article
Pages	Page numbers in the journal that contain the article **NOTE:** If no value is entered in this field, the values of the **Start page** and **End page** fields are registered as the **Pages** value.
Start page	First page in the journal on which the article appears
End page	Last page in the journal on which the article appears
Year	Year the book was published

4 In the **Request Attribute** area, enter the required information in the relevant fields, as described in the following table.

Table 11. Request Attribute Fields

Field	Description
Requester (Required)	Select the user that is requesting the item. **NOTE:** If you select a user for which a resource sharing library was assigned, the assigned resource sharing library displays in the **Owner** field. For details on assigning a resource sharing library to a user, see **Table 2** in the *Alma Administration Guide*.
Request status	The status of the request.
Requested Format	Format of the requested item – **Digital**, **Physical**, or **Physical non-returnable**. Items with a status of **Physical non-returnable** are picked up at the resource sharing library and are kept by the patron, or can be sent directly to a patron. **VIDEO:** For more information about sending resource sharing items directly to a patron, see the *Inter-Library Loans Personal Delivery* video (10:51 mins).
Allow other format	Select the check box to indicate that if the requested format is unavailable, the patron is willing to receive the item in another format.

Table 11. Request Attribute Fields

Field	Description
Owner (Required)	The Alma resource sharing library that is responsible for the request. The displayed libraries are configured as resource sharing libraries in the General Configuration menu (see **Managing Institutions and Libraries** in the *Alma Administration Guide*). **NOTE:** If a user for which you assigned a resource sharing library is selected in the **Requester** field, the assigned resource sharing library displays in the **Owner** field. If no resource sharing library was selected for the user specified in the **Requester** field, the **Owner** field displays the value configured in the **ill_item_creation_lib_code** field on the Customer Parameters Mapping Table page (**Fulfillment > Fulfillment Configuration > Configuration Menu > General > Other Settings**). You can create relationships between resource sharing libraries to enable the libraries to supply items for each other (see **Configuring Fulfillment Relationships** in the *Alma Fulfillment Guide*).
Partner	Displays the first partner configured in a request's rota. A rota represents the list of available partners. Alma sends the request to individual partners in the list until the request is fulfilled. Click **Add Partners** to add a partner to the request's rota, and click **Add Rotas** to add a rota template (group of partners). For details on adding partners, see Step **6**. For details on adding rota templates, see Step **7**. ■ For details on configuring partners, see **Resource Sharing Requests** in the *Alma Integrations with External Systems Guide*. ■ For details on configuring rota templates, see **Configuring Rota Templates** on page **183**.
Item creation location	Displayed only when a non-NCIP partner is selected. Select the location in which the temporary item is to be created.

Table 11. Request Attribute Fields

Field	Description
External identifier	The identifying string provided by the external system. The identifier is sent to the partner. ■ When an NCIP or ISO partner is selected, a value can be entered manually ■ When an ARTEmail partner is selected, a value is generated automatically **NOTE:** After creating the request, an Internal identifier value is displayed for borrowing requests of all status types, including those that were canceled or rejected. When there is no external identifier (such as for canceled or rejected requests), you can search for a request by the request's internal identifier.
Preferred send method	Select the preferred method of sending the item. Choose from the following options: ■ Ariel ■ Email ■ Fax ■ FTP ■ Odyssey
Needed by	Select a date by which the item is required to be delivered

Table 11. Request Attribute Fields

Field	Description
Delivery location	Location to which the item is to be delivered. Displayed when the ARTEmail partner of the request supports adding an address. Choose from: ■ **Deliver to library** – Delivers to the library indicated in the **Pickup at** field. You can create relationships between libraries to enable the libraries to deliver items to each other (see **Configuring Fulfillment Relationships** in the *Alma Fulfillment Guide*). ■ **Alternative address** – Delivers to the address indicated in the **Alternative address** field. If the Format value is **Digital**, this field contains an email address. The **Alternative address** option displays only if **rs_support_add_service=True** on the CustomerParameters Mapping Table (see **Configuring Other Settings** on page **406**).
Pickup at	The values displayed in the drop down list are the libraries that are configured with the **Deliver to** option on the Organizational Units Relations Setup page (see **Configuring Fulfillment Relationships** on page **241**). If personal delivery is configured for the specified patron, the Personal Delivery option displays with the Home Address and/or Work Address sub-options, as configured on the patron's User Details page (see **Working With Contact Information** in the *Alma Administration Guide*).
Shipping cost	Enter a shipping cost for the request. The displayed currency is the default currency of the institution. If a shipping cost borrower rule is configured, it is applied to the shipping cost of the request (see **Configuring Shipping Cost Borrower Rules** on page **374**).

Table 11. Request Attribute Fields

Field	Description
Alternative address	Displayed only when the **Delivery location** value is **Alternative address**. When the **Format** value is **Physical**, the available options are postal addresses. Select **Use different address** to display the **Postal address** fields and configure a new address. When the **Format** value is **Digital**, the available options are email addresses. Select **Use different email** to display the **Email address** field and configure a new email address.
Willing to pay	Select to indicate that the patron is willing to pay for the item
Agree to copyright terms	Select to enable resource sharing with external systems. ▪ If you select this check box, when sending a request via ISO, the **Copyright compliance** field is set to **US:CCL**. ▪ If this check box is not selected, the **Copyright compliance** field is set to **US:CCG**. The copyright compliance is saved for the lender as a note.
Needs patron information	Select to indicate that more information on the patron is needed
Request note	Enter any notes, as needed

For a description of the fields' display in Primo, see **Citation Linker** in the *Alma Integrations with Primo Guide*.

5 If you chose an ARTEmail partner, configure parameters in the Parameters tab. The parameters displayed are those selected for the partner during the partner configuration process (see **Resource Sharing Requests** in the *Alma Integration with External Systems Guide*).

6 To add partners to a request's rota:

a Click **Add Partners** to add individual partners to the request's rota. The Resource Sharing Partner List page displays with the list of available resource sharing partners.

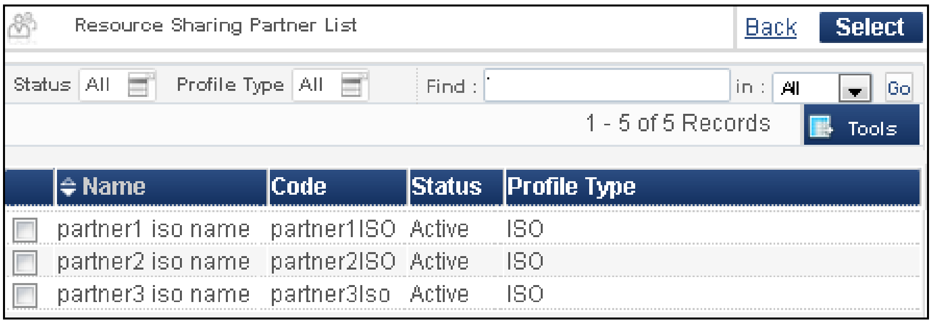


Figure 107: Resource Sharing Partner List Page

b Select the check box of the partner(s) to add to the request's rota, and click **Select**.

If you select a partner with which you associated a locate profile, the request displays on the Resource Sharing Borrowing Request page with a **Locate Resource** link. Click the link to submit a locate resource request for the borrowing request. Alma searches the request’s partners to verify that they have the resource. Partners that do not have the resource are removed from the request’s rota. For details on associating a partner with a locate profile, see the procedure in **Resource Sharing Requests** in the *Alma Integrations Guide*.

7 To add rota templates:

a Click **Add Rotas** to add rota templates to a request. The Rota Templates page displays with the list of available rota templates.

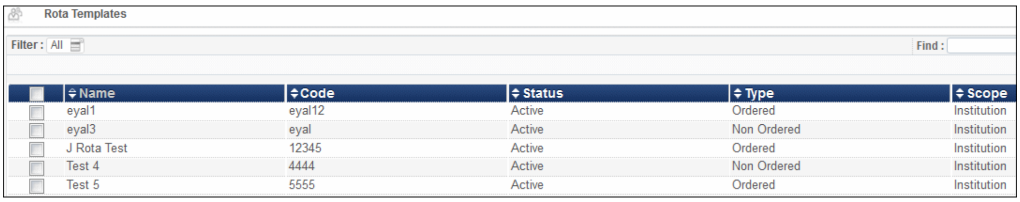


Figure 108: Rota Templates Page

b Select the check boxes of the rota templates to add to the request, and click **Select**. Alma sends the request to individual partners in the list until the request is fulfilled.

You can configure rotas to be used either in the order in which they are listed (Ordered) or in a random order (Non-ordered), via Fulfillment Configuration (see **Configuring Rota Templates** on page **183**).

8 Click **Save** to save the request with the selected parameters, or click **Send** to save the request with the selected parameters and send an ARTEmail to the partner according to the selected parameters. The Resource Sharing Borrowing Requests page displays the new item.

NOTE:

The **Send** button displays only if there is an active partner to which the request can be sent, and the **Automatically activate locate profile** option is not selected when configuring a resource sharing library (see **Configuring Libraries** on page **237**).

Click **Save and Edit** to enable adding additional information on the Resource Sharing Borrowing Request page, on the following tabs:

- **Audit** – see **Viewing Borrowing Request Actions** on page **150**
- **Rota** – see Step **3** in **Editing a Borrowing Request** on page **146**
- **Parameters** – see Step **4** in **Editing a Borrowing Request** on page **146**
- **Notes** – see Step **5** in **Editing a Borrowing Request** on page **146**
- **Attachments** – see Step **6** in **Editing a Borrowing Request** on page **146**

NOTES:

When a resource sharing request is placed, the requesting patron's resource sharing library is validated before the request can continue. If a warning message displays stating **Patron does not have resource sharing privileges**, and the patron's resource sharing library is not the predefined resource sharing library, it is recommended that you do one of the following to ensure that Alma checks the appropriate policy for the resource sharing library in use, or uses the library/institution's default terms of use:

- Configure a Resource Sharing Borrowing Request rule for the specified resource sharing library (see **Configuring Fulfillment Units, Policies and Item Policies, and Terms of Use** on page **273**)
- Modify the Allow Resource Sharing Requesting Policy of the library and/or institution default terms of use (see **Adding Fulfillment Policies** on page **284**)

  Alternatively, you can click **Confirm** in the warning message dialog box to continue without invoking a rule for the request.

To attach a rota to a request based on configured rota assignment rules, click the **Recalculate Rota Assignment** link to attach the rota to the request according to the configured rules. For details on configuring rules for a rota, see **Configuring Rota Assignment Rules** on page **366**.

Editing a Borrowing Request

You can edit the parameters configured for a borrowing request.

To edit a borrowing request:

1 On the Resource Sharing Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**), click **Edit** beneath an item. The General Information tab on the Resource Sharing Borrowing Requests page opens.

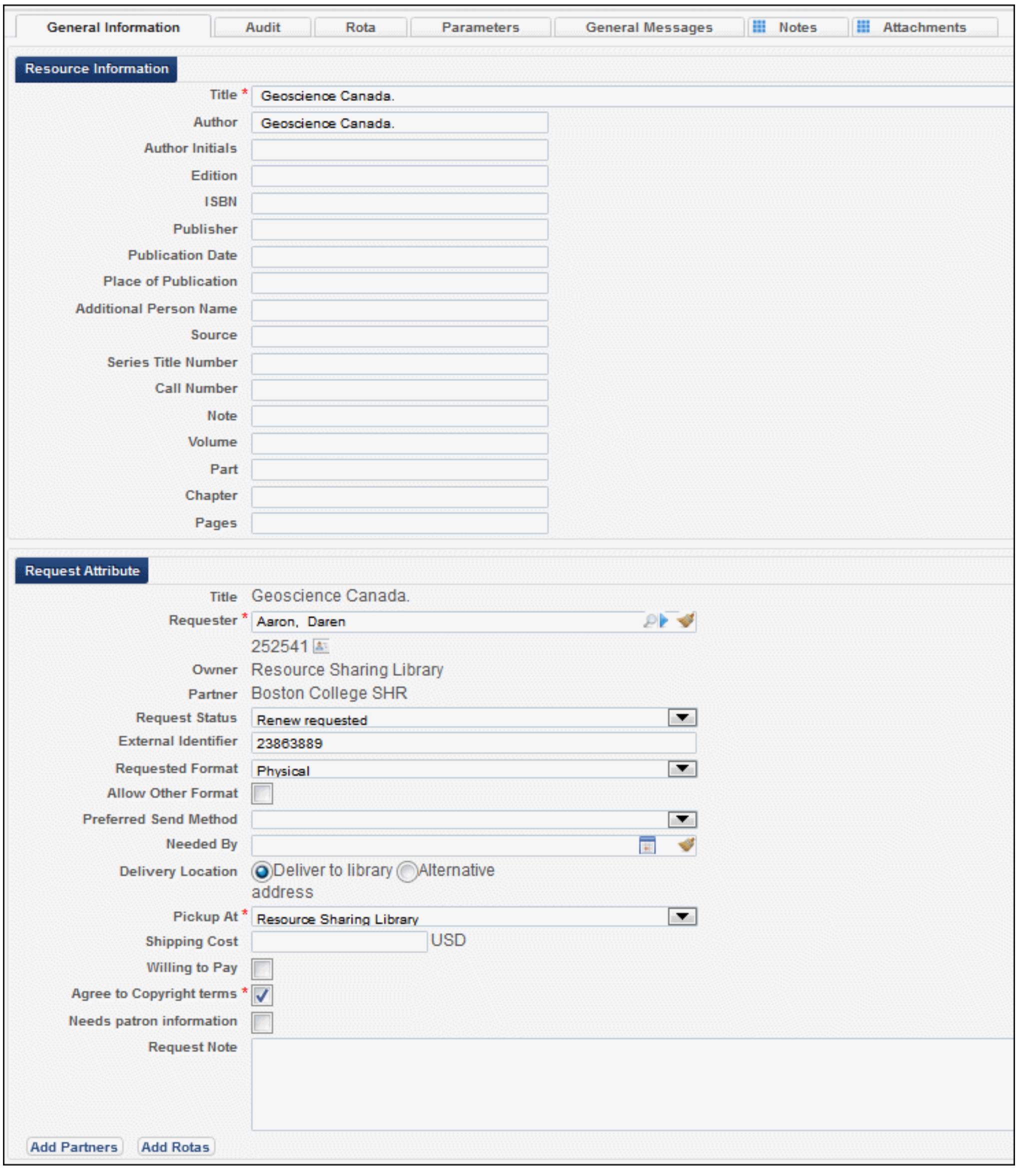


Figure 109: Resource Sharing Borrowing Request Page – General Information Tab

2. Modify the fields as needed. For a description of the displayed fields, see **Table 10** and **Table 11**.
3. To manage partners in a request's rota:
   a. Click the **Rota** tab. The Rota page displays, showing the list of partners in the current rota.

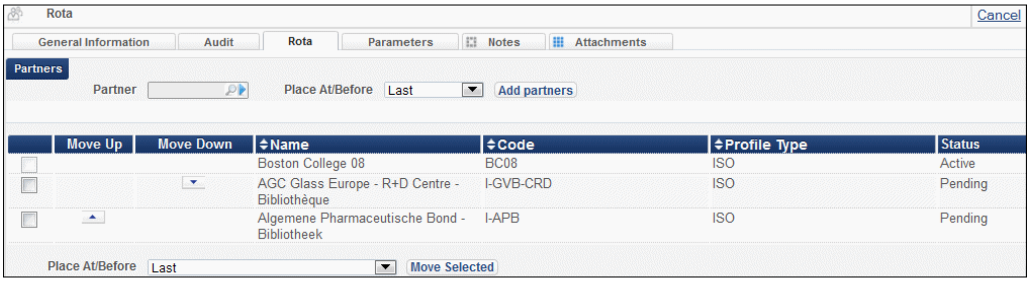


Figure 110: Rota Tab Page

   b. Click the Browse icon in the **Partner** field. The Resource Sharing Partner List page opens, displaying the list of available Resource Sharing Partners.

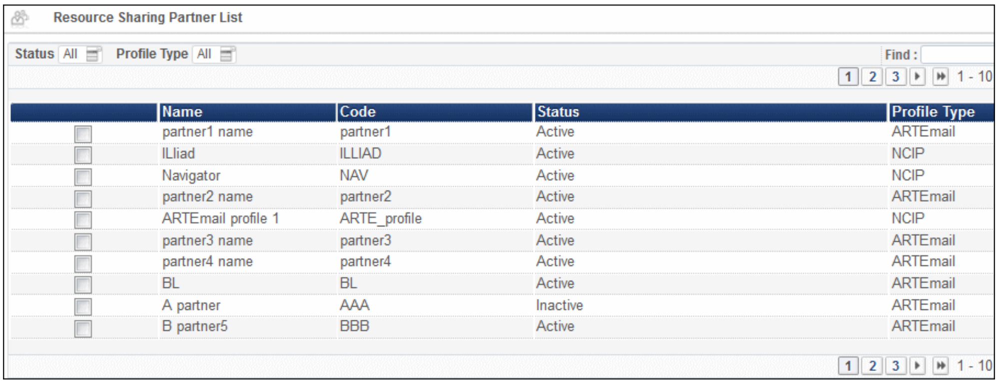


Figure 111: Resource Sharing Partner List Page

   c. Select the check box of the partners you want to add to the rota and click **Select**. The Rota page displays, with the partners listed in the **Partner** field.

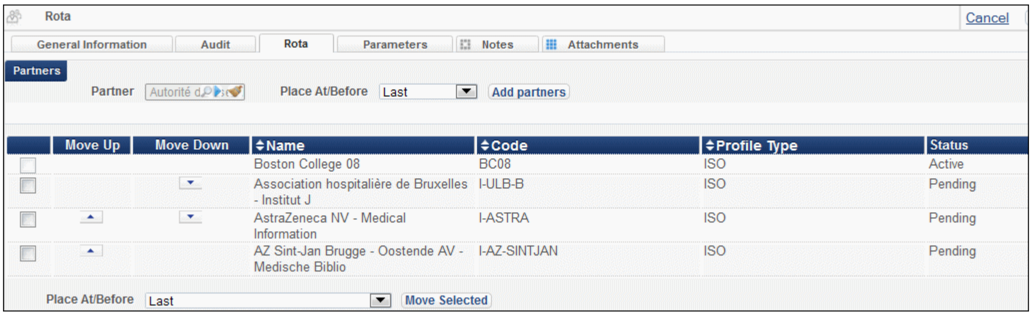


Figure 112: Rota Page With Partners in Partner Field

d In the **Place at/Before** drop down list at the top of the page, select the location for the partners to be placed in the partner list, and click **Add partners**. The selected partners display on the page.

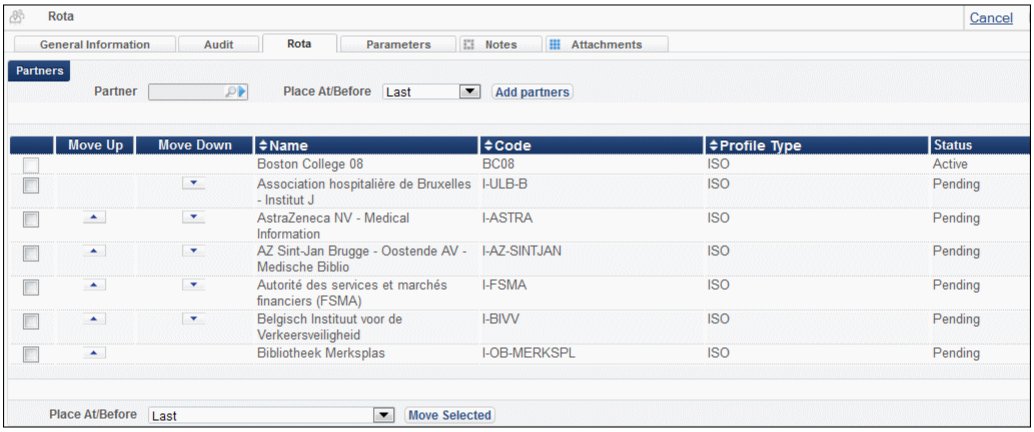


Figure 113: Rota Page With Partners

NOTE:

You can also add partners to a rota by clicking **Add partners** on the Resource Sharing Borrowing Requests page and select the partners you want to add.

e To modify the order of rota partners, do one of the following:

- Use the **Move Up** and **Move Down** arrows to set the order of the partners.
- Select the check boxes of the partners you want to move and in the **Place At/Before** field at the bottom of the page, select the location in which you want the partners to be placed and click **Move selected**.

NOTE:
You can modify the order of rota partners with a status of **Pending** only.

f. To delete a rota partner, click **Remove** for the relevant partner.

g. To cancel a rota's active partner, click **Actions > Cancel** for the rota. Partners can be canceled only if canceling is enabled in the partner's workflow profile.

4. On the **Parameters** tab, modify parameters, as needed. The parameters displayed are those selected for the partner during the partner configuration process (see **Resource Sharing Requests** in the *Alma Integration with External Systems Guide*).

5. On the **Notes** tab, add and edit notes as needed.

   - To add a note, type your note in the **Note** field and click **Add**. The note is displayed in the list of notes on the page.

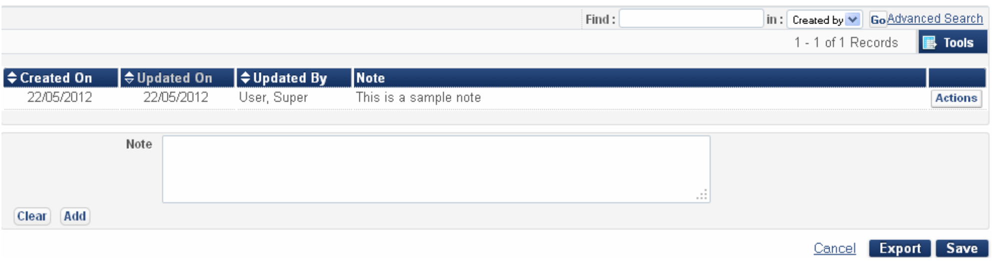


Figure 114: List of Notes - Notes Tab

   - To edit a note, select **Actions > Edit** for the note that you want to update, modify the note on the Edit Note page, and click **Save.**
   - To delete a note, select **Actions > Delete** for the note that you want to delete and click **Confirm** in the Confirmation Message pop-up window.
   - To locate a note in the list of notes, enter the text for which you want to search in the **Find** box and select the field—**Created by**, **Modified by**, or **Note**—in which you want to search for the text.

NOTE:
The icon on the Notes tab indicates that information is available in the tab. The icon on the Notes tab indicates that there is no information in the tab.

Notes can be added for all resource sharing borrowing requests, including those with a status of **Request Completed**.

6. On the **Attachments** tab, add and edit attachments as needed.

- To add an attachment, click **Browse** in the **File name** field and select a file. Add a URL and/or note, if required, and click **Add Attachment**. The attachment is displayed in the list of attachments in the Attachments tab.

Figure 115: List of Attachments - Attachments Tab

- To edit an attachment, select **Actions** > **Edit** for the attachment that you want to update, modify the **File name**, **URL**, and **Notes** fields as required, and click **Save Attachment**.
- To delete an attachment, select **Actions** > **Delete** for the attachment that you want to delete and click **Confirm** in the Confirmation Message pop-up window.
- To download a file, select **Actions > Download** for the file that you want to download, specify the folder to which you want to save the file, and click **OK**.

NOTE:

The icon on the Attachments tab indicates that information is available in the tab. The icon on the Attachments tab indicates that there is no information in the tab.

Attachments can be added for all resource sharing borrowing requests, including those with a status of **Request Completed**.

7 Click **Save** to save your changes.

Viewing Borrowing Request Actions

The **Audit** tab displays the actions taken on resource sharing borrowing or lending requests, such as changing the request's status, adding a shipping cost, and so forth. The Audit tab is available when editing a resource sharing request.

To view resource sharing borrowing and lending request actions:

1 On the Resource Sharing Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**), click **Edit** for a request. The Resource Sharing Borrowing Request page displays.

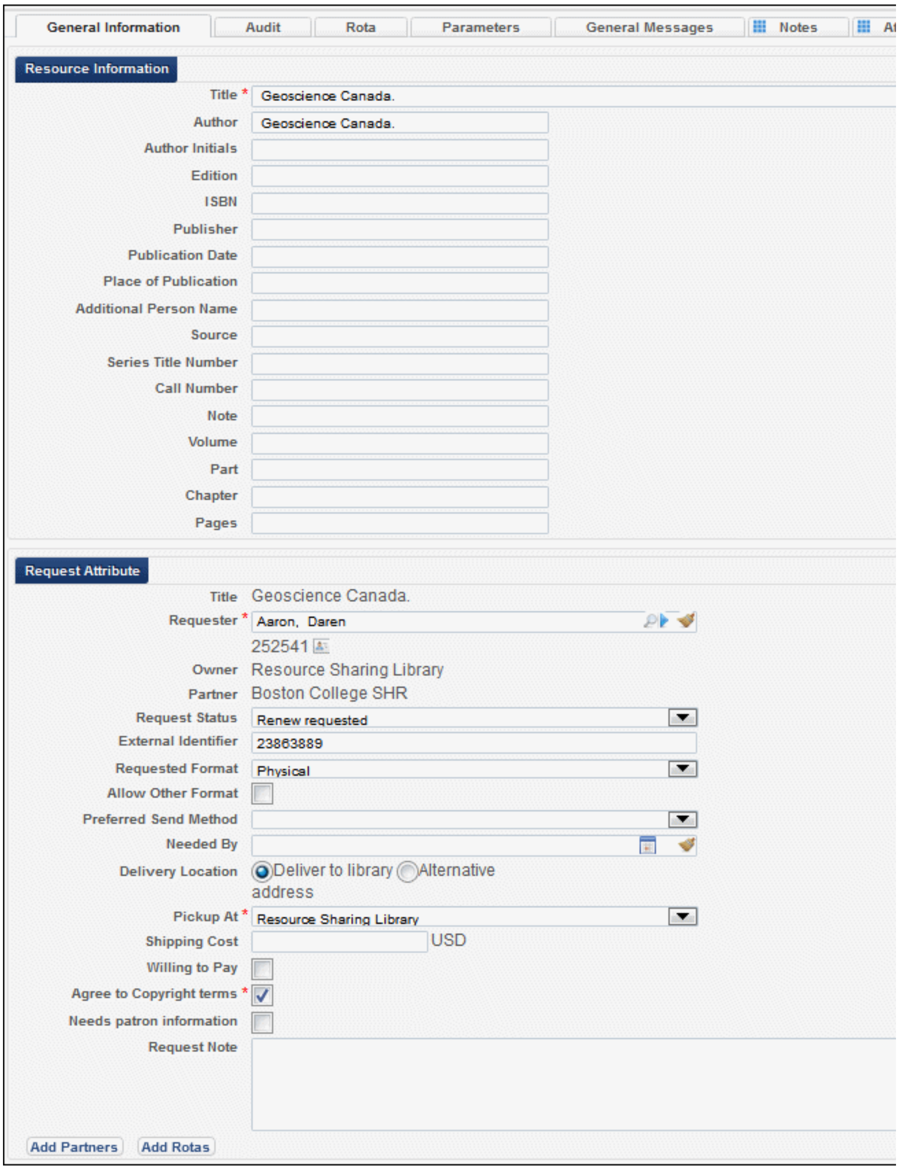


Figure 116: Resource Sharing Borrowing Request Page – General Information Tab

2 Click the **Audit** tab. The Audit tab page displays the list of actions performed on the resource sharing borrowing or resource sharing lending request.

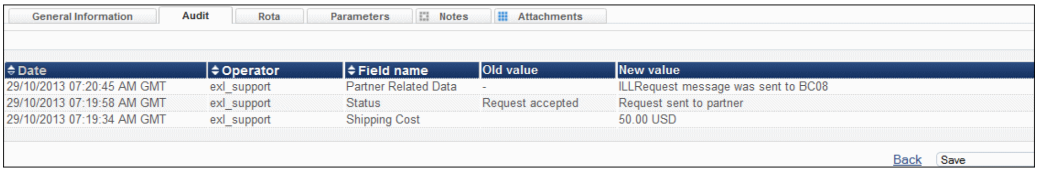


Figure 117: Audit Tab Page

Sending a Borrowing Request

You can send a request to an ARTEmail or ISO partner.

To send a borrowing request:

1 On the Resource Sharing Borrowing Requests Page (**Fulfillment > Resource Sharing > Borrowing Requests**), click **Send** for a request. When sending to an ARTEmail partner, the Parameters tab of the Resource Sharing Borrowing Requests page opens.

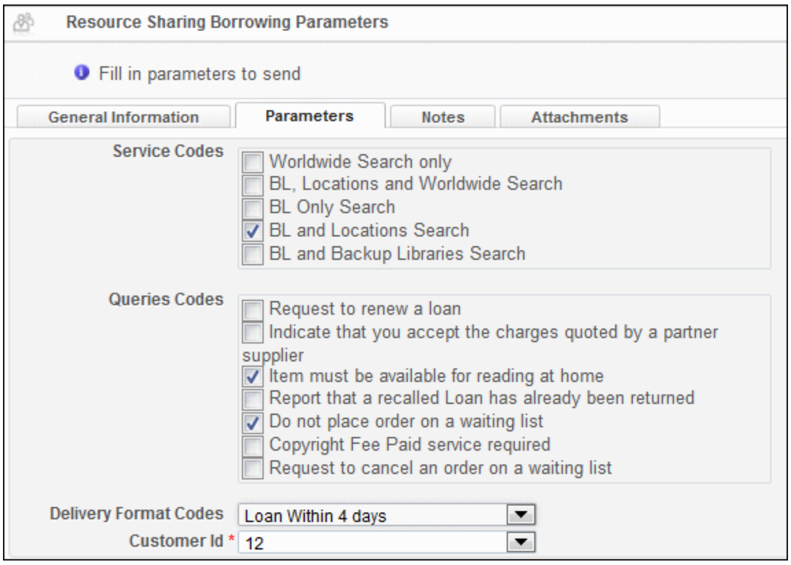


Figure 118: Resource Sharing Borrowing Parameters Page

2 Select one or more loan parameters in the **Service codes** and **Query codes** sections.

NOTE:
The service codes and query codes displayed depend on those configured in Fulfillment Configuration when configuring Resource Sharing Partners (see **Configuring Partners** on page **183**). For an explanation of the service and query code values, refer to the *British Library's Guide to ARTEmail*.

3 Select a delivery format code in the **Delivery Format Codes** field.

4 Select the requesting customer in the **Customer Id** field.

5 Click **Save** to save the request with the selected parameters, or click **Send** to save the request with the selected parameters and send the request to the ARTEmail or ISO partner.

Rejecting a Borrowing Request

You reject borrowing requests that have been rejected by the lending institution. Requests are rejected for a variety of reasons. For example, if an item is already on loan or is not found in the library, it is rejected by the lending institution, and you can mark it as rejected at the borrowing institution.

To reject a request in the borrowing institution, click the **Reject** option on the Resource Sharing Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**).

To mark a request as rejected by the lending institution:

1 On the Resource Sharing Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**), click **Reject** for a request. The Reject Request dialog box opens.

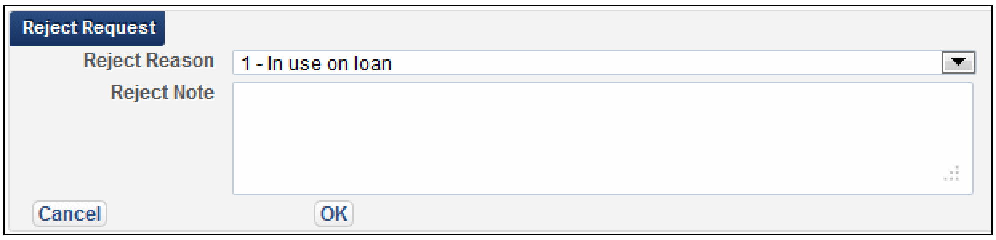


Figure 119: Reject Request Pop-up Window

2 Select a reason for the rejection in the **Reject reason** field.

3 Optionally, add a note for the rejection in the **Reject note** field.

4 Click **OK**. The request's citation status changes to **Rejected the borrower request**, and the **Reject reason** and **Reject note** are displayed in the Notes tab for the request (click the **Edit** link for the request to view the Notes tab).

A rejection notification is sent to the requesting patron.

Managing Resource Sharing Lending Requests

PERMISSIONS:

To manage resource sharing lending requests, you must have one of the following roles:

- Fulfillment Services Operator (for the resource sharing library)
- Fulfillment Services Manager (for the resource sharing library)

The following is an illustration of the resource sharing requests workflow that governs the way resource sharing lending requests are managed by the resource sharing lending institution after it receives a resource sharing request:

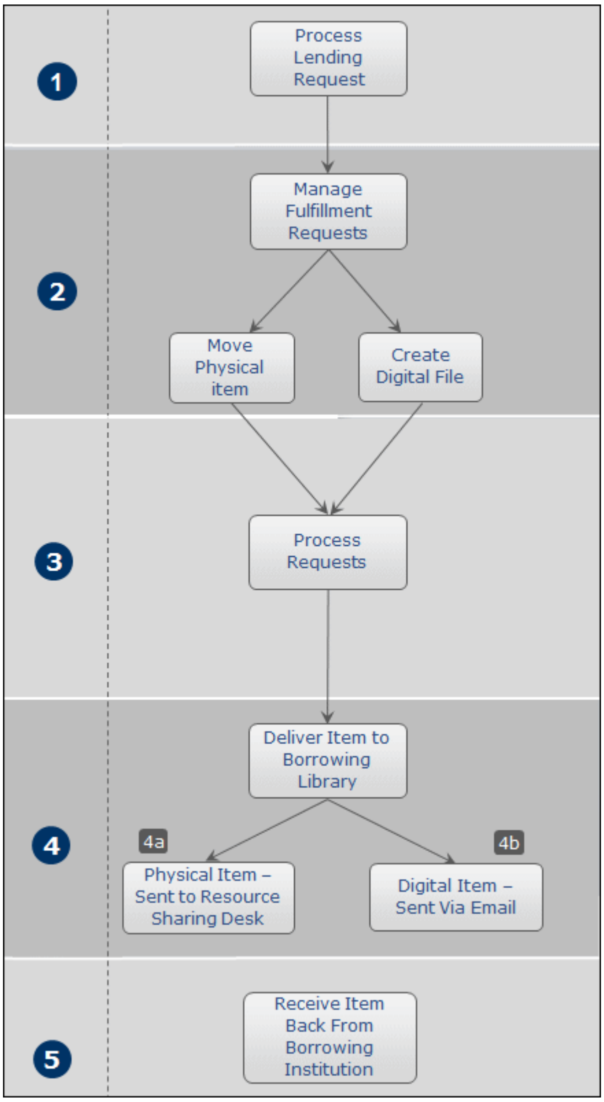


Figure 120: Resource Sharing Lending Requests – Workflow

The following is a detailed description of the steps within this workflow (with the numbers corresponding to the numbers in the diagram):

1 Add a lending request, either manually (see **Adding a Resource Sharing Lending Task Manually** on page 162) or via search (see **Adding a Resource Sharing Lending Task From a Search** on page 164).

2 Process the lending request via Manage Fulfillment Options - this retrieves the resource, either by moving a physical item or creating a digital file (see **Managing Fulfillment Options** on page 168).

3 Process the resources that are to be used to fulfill the resource sharing request (see **Placing Requests** on page 171).

4 Shipping the resources (see **Shipping Resource Sharing Lending Request Resources** on page 174), as follows:

   a **Physical Items** – Send to resource sharing desk

   b **Digital Items** – Send via email

5 Receive the item back from the borrowing institution and scan it in to the library to be reshelved. This is done in the same manner as described in **Shipping Resource Sharing Lending Request Resources** on page 174.

   After you scan an item into Alma, an ISO checked-in message is sent to the borrowing library and the request closes automatically. A checked-in ISO message is sent only if the active partner's workflow profile includes **Checked In Message** as a valid option (see **Configuring Workflow Profiles** on page 361).

The Fulfillment Services Operator manages the pool of resource sharing lending requests on the Resource Sharing Lending Requests Task List page.

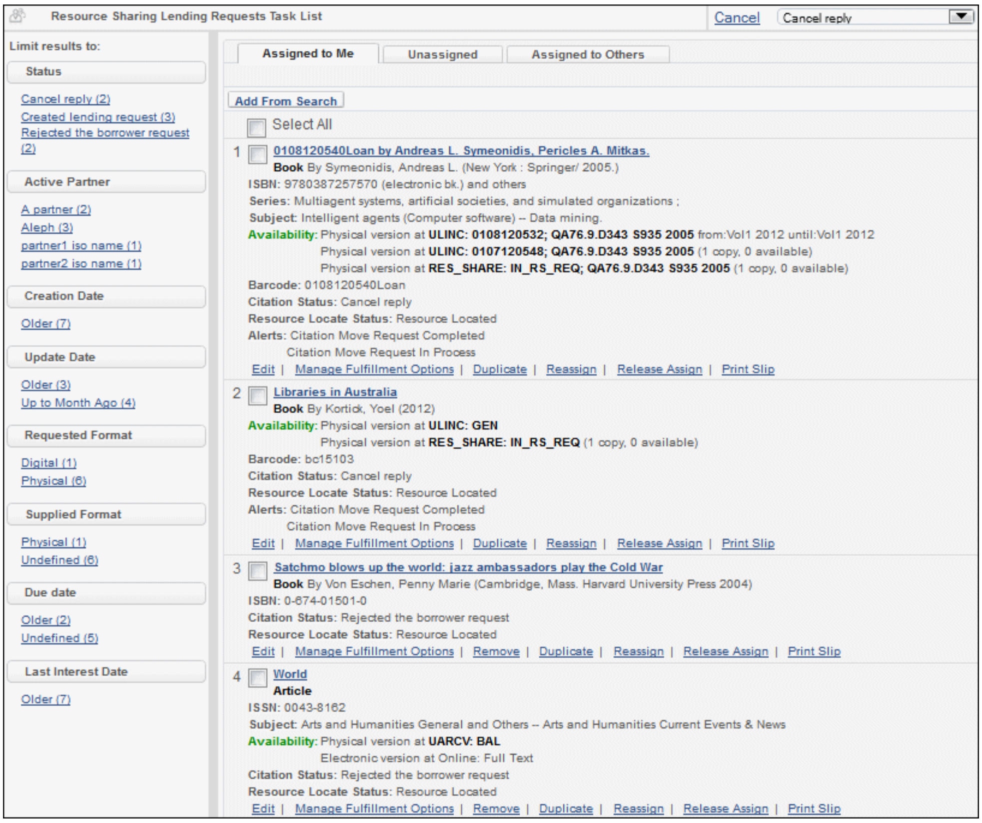


Figure 121: Resource Sharing Lending Requests Task List Page

To manage the lending resource sharing tasks:

1 On the Resource Sharing Lending Requests Task List page (**Fulfillment** > **Resource Sharing** > **Lending Requests**), click one of the following tabs:

- **Assigned to Me** – Displays resource sharing tasks that are assigned to the user that is logged in. The contents of this tab are also displayed under the heading **New lending requests – assigned to you**, accessible from the **Tasks** link on the Alma home page.
- **Unassigned** – Displays resource sharing tasks that are unassigned. The contents of this tab are also displayed under the heading **New lending requests – unassigned**, accessible from the **Tasks** link on the Alma home page.
- **Assigned to Others** – Displays resource sharing tasks that are assigned to other users. This tab is displayed only if the logged-in user has the role of Fulfillment Services Manager.

NOTE:
A Fulfillment Services Manager can view resource sharing tasks assigned to other users, as well as release and reassign these tasks, but cannot duplicate or edit resource sharing tasks assigned to others.

2 Locate the task or tasks you want to manage. You can locate specific tasks using the **Find** box at the top of the list, or via the **Status**, **Partner**, and **Alerts** filters on the left side of the page. You can add a task to the list manually (see **Adding a Resource Sharing Lending Task Manually** on page **162**) or from a repository search (see **Adding a Resource Sharing Lending Task From a Search** on page **164**).

To manage several tasks simultaneously, select the check boxes to the left of these tasks (or **Select all**) and click one of the following buttons:

- **Change Status** – Changes the status of the specified items. Select a status from the drop-down list and click **Change Status**.
- **Print Slip Report** – Prints a call slip that is sent to a printer or email address, or can be downloaded to a local machine (see **To generate a print slip report for a resource sharing lending request:** on page **161**). The print slip report is sent as plain text.

VIDEO:
For more information about the print slip report for lending requests, see the *Print Slip Report for Lending Requests* video (2:35 mins).

- **Print Slip** – Prints a call slip for each of the selected items.

- **Remove Requests** – Removes requests associated with the items. Click **Confirm** in the Confirmation Message dialog box to remove the requests.
- **Remove Alerts** – Removes alerts associated with the items. Click **Confirm** in the Confirmation Message dialog box to remove the alerts.

To manage a specific task, click one of the links beneath the relevant task, as described in the following table:

Table 12. Request Sharing Lending Requests Task List Links

Link	Description
Edit	Available in the Assigned and Unassigned tabs. Clicking **Edit** for an unassigned task locks the task for editing by other operators. Clicking this option opens the Resource Sharing Lending Request page, enabling you to edit the resource sharing task. For a list of fields displayed on this page, see **Table 10** and **Table 13**.
Manage fulfillment options	The Fulfillment Services Operator performs internal library procedures which makes the resource requested by the resource sharing library available (see **Managing Fulfillment Options** on page **168**).
Remove	Removes the request from the system.
Duplicate	Creates a new task based on the existing one. The Resource Sharing Lending Request page opens, where you modify the request parameters in the Request Attribute section, as needed (see **Table 13**). When duplicating a Resource Sharing Lending request, the values in the following fields are copied to the new request: ■ Request status ■ External identifier ■ Format
Reassign	Enables reassigning a task to another user (see **Reassigning a Task** on page **176**).
Detach from MMS	Detaches a lending request from its inventory (see **To detach a resource sharing lending request from inventory:**, below).

Table 12. Request Sharing Lending Requests Task List Links

Link	Description
Checked In	Sends an ISO checked-in message to the borrowing library, indicating that the item has been returned to the lending library. The request is automatically closed. **NOTE:** A checked-in ISO message is sent only if the active partner's workflow profile includes **Checked In Message** as a valid option (see **Configuring Workflow Profiles** on page **361**).
Locate	Displayed for items for which **Resource Locate Status = No Resources Located**. Alma attempts to locate the resource, either due to the resource not being located or because there are multiple resources that have been found. It is recommended to click **Edit** for a resource and update relevant information before clicking **Locate**. When a resource is located, the status changes to **Resource Located**.
Search	Displayed for items for which **Resource Locate Status = No Resources Located**. Opens the repository search page, which enables performing a new resource search to locate the resource.
Reject	Enables rejecting a lending request (see **Rejecting a Lending Request** on page **173**).
Release assign (on the **Assigned to Me** tab)	Moves the task from the **Assigned to Me** tab to the **Unassigned** tab.
Renew	When **Request Status = Received by Partner** for non-ISO requests and **Manual renew** is selected as a step in the workflow profile, click this option to open the Due Date dialog box. Enter a due date and click **OK** to accept the renewal request.

Table 12. Request Sharing Lending Requests Task List Links

Link	Description
Renew Reply	Displayed for ISO requests whose **Request Status = Renew Requested** and whose workflow profile is configured as follows: ▪ **Manual renew** is selected as a step ▪ **Automatic renew** is not selected as a step (For details on configuring workflow profiles, see **Configuring Workflow Profiles** on page 361.) Clicking the **Renew Reply** option opens a dialog box where you select whether to accept or reject the renewal request. ▪ Accepting the renewal request updates the request's status to **Renew Request Accepted**. ▪ Rejecting the renewal request updates the request's status to **Renew Request Not Accepted**.
Print slip	Prints a call slip for the item.
Ship non-returnable	Ships the request to the borrowing library as a non-returnable copy, with the status **Shipped Physically**. Displayed only when the request’s format is **Physical non-returnable**.
Ship item	Click to ship the item associated with the request. The Shipping Items page opens (see **Shipping Items** on page 180).
General Message	Enables sending a general message with a lending request to a borrower (see **Sending a General Message With a Resource Sharing Request** on page 133).

NOTE:

If a request is processed automatically (via ISO/NCIP) and if either no resource is found or multiple resources are found that match the input criteria, the request is created with **Citation Status = Locate Failed** and **Resource Locate Status = No Resources Located**.

To detach a resource sharing lending request from inventory:

1. On the Resource Sharing Lending Requests Task List page, locate a request that has resources attached to it (**Resource Locate Status** = **Resource Located**).
2. Click **Detach from MMS**. The Resource Sharing Lending Requests Task List page refreshes, and the request displays with **Resource Locate Status** = **No Resources Located**.

To generate a print slip report for a resource sharing lending request:

1. Open the Resource Sharing Lending Request Task List page (**Fulfillment** > **Resource Sharing** > **Lending Requests**). The **Print Slip Report** button displays at the top of the page.

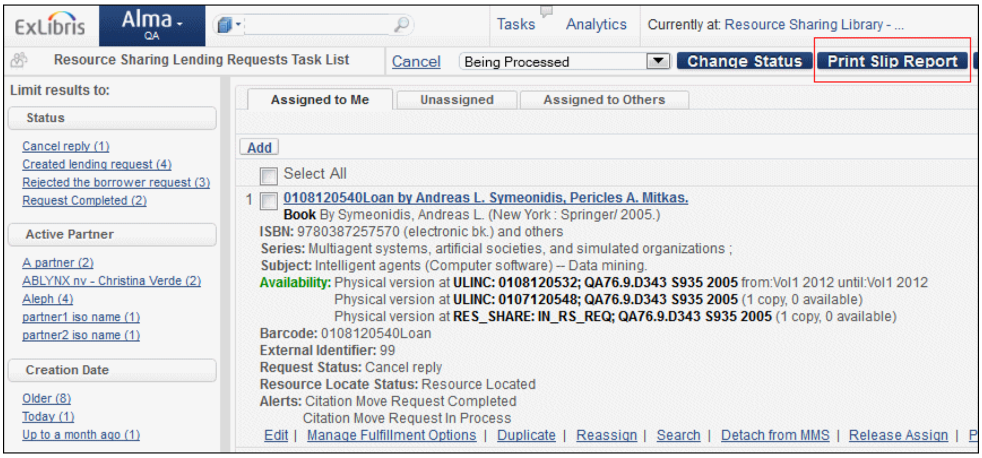


Figure 122: Resource Sharing Lending Requests Task List Page – Print Slip Report Button

2. Select the check boxes of the resources for which you want to generate a print slip report and click the **Print Slip Report** button. The Print Slip Report Dialog Box opens.

Figure 123: Print Slip Report Dialog Box

3 In the **Choose type** field, select whether you want to send the print slip report to a **Printer** or a **User**.

If you select **Printer**, the **Printer** field is enabled, from which you select a printer to send the print slip report.

If you select **User**, the **User** field is enabled, from which you select a user to send the print slip report via email.

4 In the **Format type** field, select to send the print slip report either in **Excel** or **XML** format.

5 Click **Send** to send the print slip report, or optionally, click **Download** to download the print slip report to your local machine.

Adding a Resource Sharing Lending Task Manually

You can manually add a resource sharing lending request to the list of resource sharing tasks.

To add a resource sharing lending task manually:

1 On the Resource Sharing Lending Requests Task List page (**Fulfillment > Resource Sharing > Lending Requests**), click **Add > Manually** and select whether you want to add a **Book** or an **Article**. The relevant Resource Sharing Lending Request page opens.

- **Book** – The following page opens:

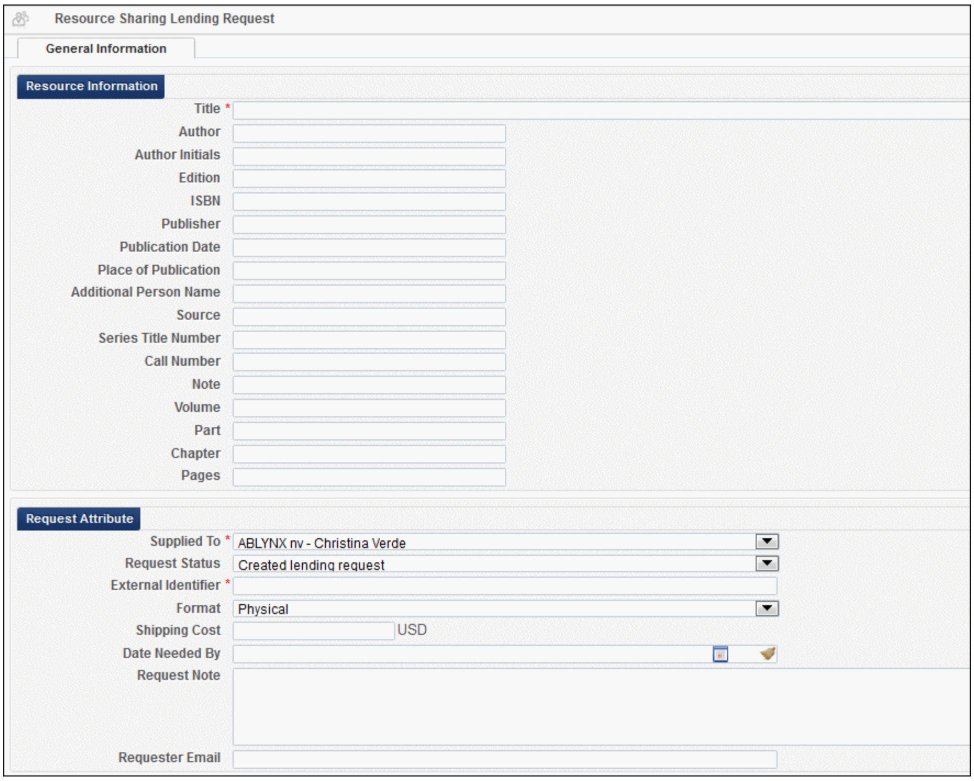


Figure 124: Resource Sharing Lending Request Page – Book

- **Article** – The following page opens:

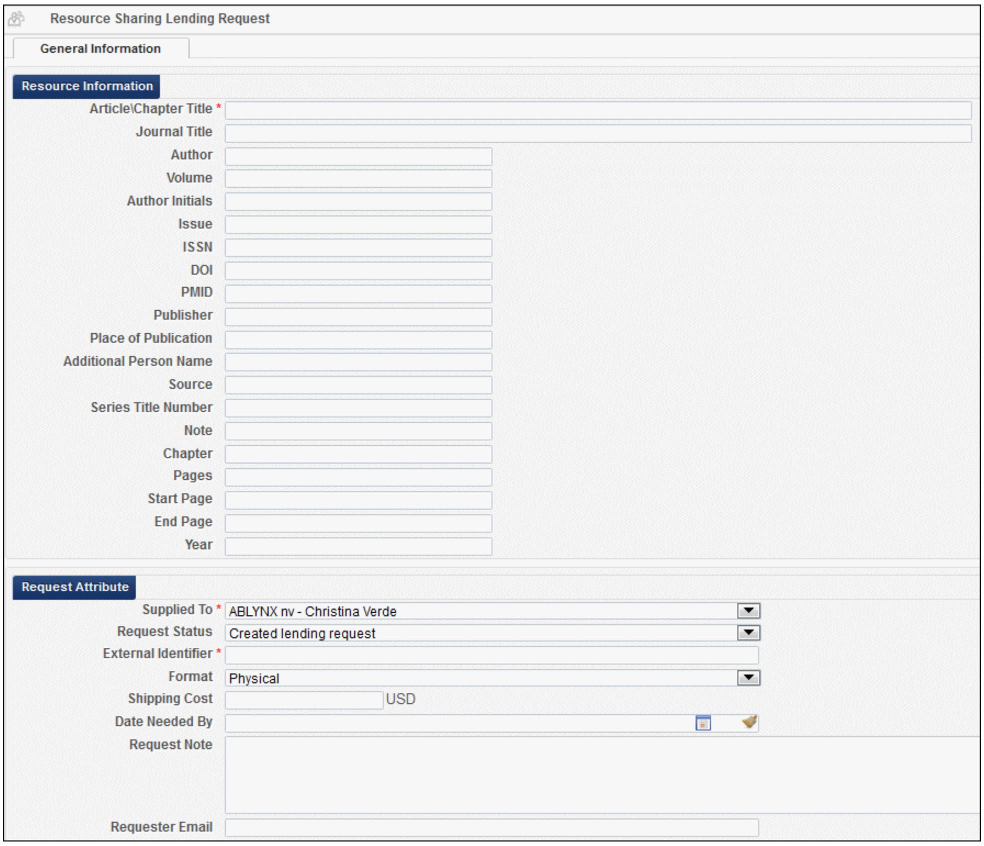


Figure 125: Resource Sharing Lending Request Page – Article

2. In the **Resource Information** area, enter information in the relevant fields, as described in **Table 10**.
3. In the **Request Attribute** area, enter information in the relevant fields, as described in **Table 13**.

Adding a Resource Sharing Lending Task From a Search

When you receive a request from an external institution via email, you can add an item to the list of resource sharing tasks.

To add a resource sharing task from a search:

1. On the Resource Sharing Lending Requests Task List page (**Fulfillment > Resource Sharing > Lending Requests**), click **Add > From Search**. The Repository Search page opens.

Figure 126: Repository Search Page: Add from Search

2. Select search criteria using the **Find**, **where**, and **contains** filters (see **Using the Repository Search** in the *Alma Resource Management Guide*) and click **Go**.

NOTE:
You can select only **All titles** or **Physical titles** in the **Find** box.

The Repository Search page displays a list of items that meet the search criteria. An example is shown in the figure below.

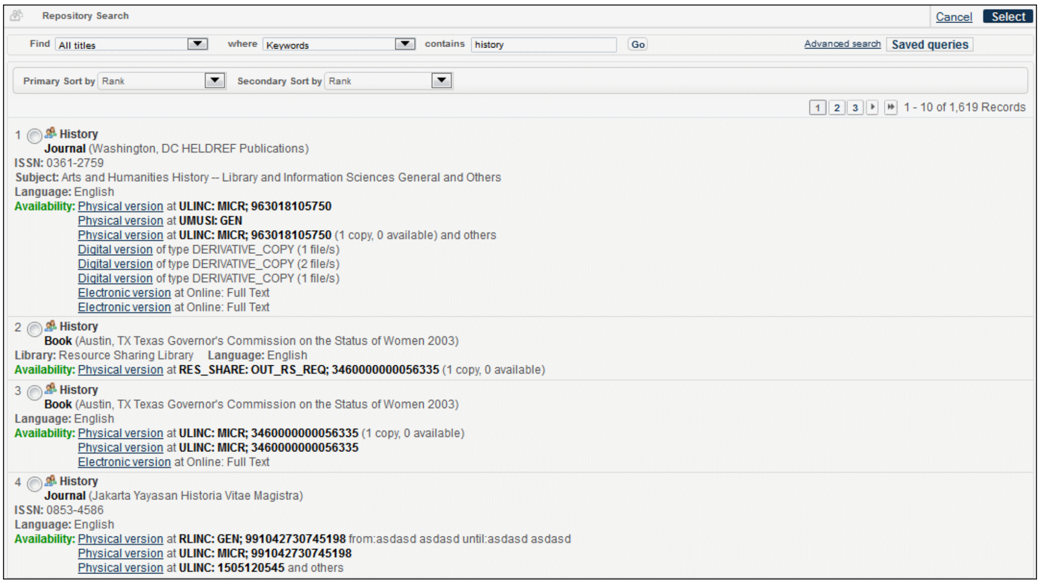


Figure 127: Repository Search List

NOTE:
When adding a borrowing request from a search in a network zone institution, the repository search page displays the **Held by** field. The value of this field indicates the locations in the network that contain the specified resource.

3 Select an item's check box and click **Select**. The **Request Attribute** section on the Resource Sharing Lending Request page opens.

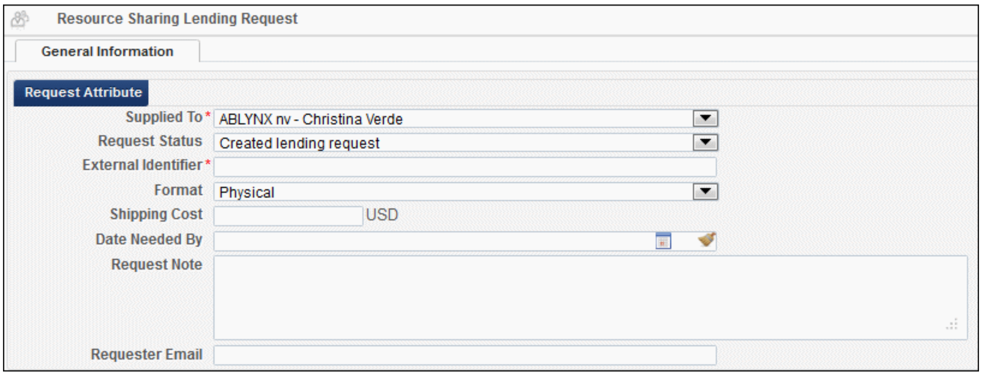


Figure 128: Request Attribute Dialog Box

4 Enter or modify the request information, as described in the following table:

Table 13. Request Attribute Fields

Field	Description
Supplied to (Required)	Select the specific integration profile, configured on the Resource Sharing Partner List page in Fulfillment Configuration (see **Configuring Partners** on page 183).

Table 13. Request Attribute Fields

Field	Description
Request status	Select the status of the request. Choose from the following: ■ Cancel reply ■ Created lending request ■ Lender check in ■ Overdue item ■ Received by partner ■ Rejected the borrower request ■ Request completed **NOTE:** The **Request completed** status indicates that the request has either been delivered, or was canceled before it reached the hold shelf. ■ Returned by partner ■ Shipped digitally ■ Shipped physically The value of this field is displayed as the **Citation Status** on the Resource Sharing Lending Requests Task List page.
External identifier (Required)	Enter the identifying string supplied by the external system.
Format	In the **Format** drop-down list, select the format of the request: ■ Digital ■ Physical
Shipping cost	Enter a shipping cost for the request. The displayed currency is the default currency of the institution. If a shipping cost lender rule is configured, it is applied to the shipping cost of the request (see **Configuring Shipping Cost Lender Rules** on page 373).
Date needed by	Select the date on which the item is needed from the **Calendar** dialog box.

Table 13. Request Attribute Fields

Field	Description
Request note	Enter any notes for the request. When editing a request, this field contains a note for the shipped item, as sent to Alma by the NCIP source system in the NCIP message's shipping note. The shipping note displays in the following format: **||Shipping Note||<text of shipping note>||Shipping Note||** The shipping note is used by NCIP implementers, such as OCLC Navigator, to update the library system with additional information about shipped items such as information about the resource itself, the requester, and the locations from where it is requested and is to be picked up.
Requester email	Enter an email address if a digital request is sent (when the configured **Request status** on the Resource Sharing Borrowing Request page is **Shipped Digitally** – see **Manually Adding a Request** on page 135). The document is delivered to this email.

5 Click **Save**. The resource sharing task is added to the Resource Sharing Lending Requests Task List page.

Viewing Lending Request Actions

You can view the actions taken on resource sharing lending requests via the **Audit** tab, in the same manner that you do for resource sharing borrowing requests. For details, see **Viewing Borrowing Request Actions** on page 150.

Managing Fulfillment Options

The Fulfillment Services Operator performs internal library procedures which make the resource requested by the resource sharing library available.

To manage fulfillment options:

1 On the Resource Sharing Lending Requests Task List page (**Fulfillment > Resource Sharing > Lending Requests**), click **Manage**

fulfillment options beneath an item. The Manage Resource Options page opens.

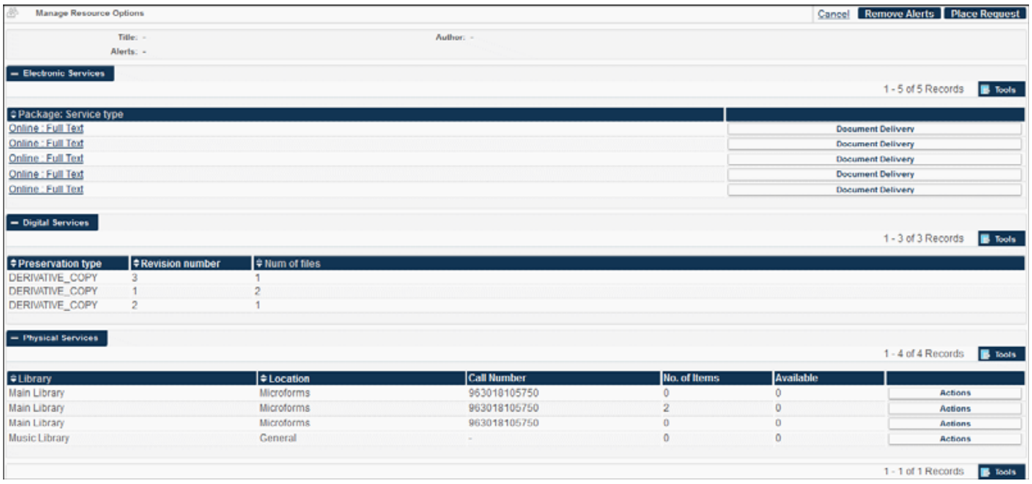


Figure 129: Manage Resource Options Page

Select from the relevant service type on the Manage Resource Options page, as follows:

- **Electronic Services** — Click **Document Delivery** to open the **Create Request** page and enable delivery of the electronic item. The Request type field has the value **Ship digitally from electronic**. Enter the part to digitize and select the target destination in the relevant fields, add the date by which the item is needed in the **Add Request Attributes** section, and click **Submit**. The submitted request is displayed on the Manage Resource Options page.

Figure 130: Manage Resource Options Page with Submitted Request

- **Digital Services** — Displays the preservation type, revision number, and number of files for digital services. You can click **Document Delivery** and then select **Attach** to attach the resource to an email and send it digitally.
- **Physical Services** — Select **Actions > View items** to view items for the resource (see **Using the List of Items** in the *Alma Resource Management Guide*). Select **Actions > Request** to create a request for the resource (see **Creating a Request** on page **16**).

  When a request's item is sent to Alma by the NCIP source system, the item's **Note** field contains a shipping note which displays in the following format:

  ||Shipping Note||<text of shipping note>||Shipping Note||

  The shipping note is used by NCIP implementers, such as OCLC Navigator, to update the library system with additional information about shipped items such as information about the resource itself, the requester, and the locations from where it is requested and is to be picked up.

You can also perform the relevant action by clicking the displayed buttons on the Manage Resource Options page:

- **Remove Alerts** – Removes alerts for the request (see **Removing Alerts** on page **175**)
- **Place Request** – Opens the Create Request page, where you select whether to ship the item digitally or physically (see **Placing Requests**, below)

Placing Requests

When the resources are available after performing fulfillment option management actions, a request for the item (digital or physical) is opened.

To place a request for an item:

1. On the Manage Resource Options page, click **Place Request**. The Create Request page opens.

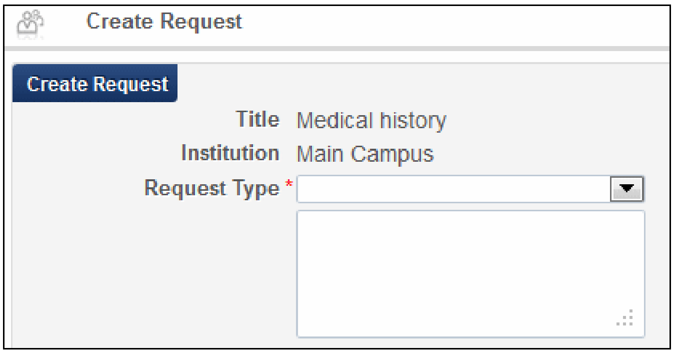


Figure 131: Create Request Page

2. In the Request type field, select **Ship digitally** or **Ship physically**, as needed. The Create Request page refreshes accordingly:
   - **Ship digitally**:

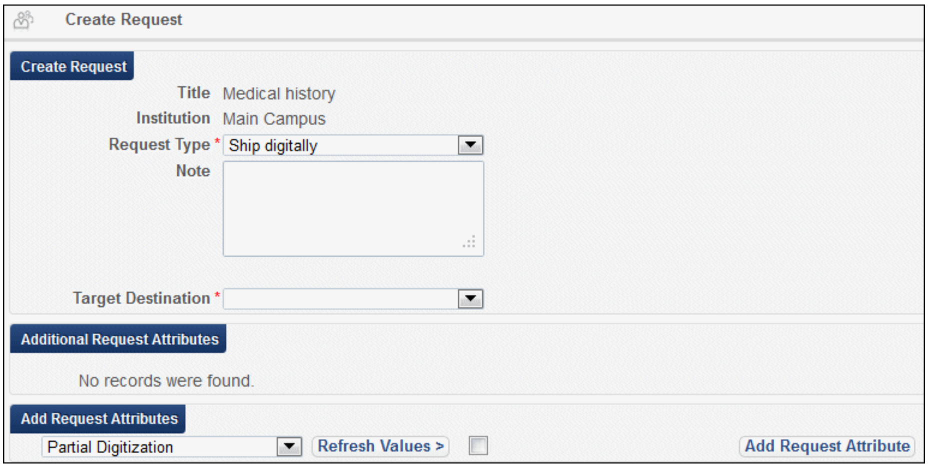


Figure 132: Create Request Page After Ship Digitally Request

- **Ship physically**:

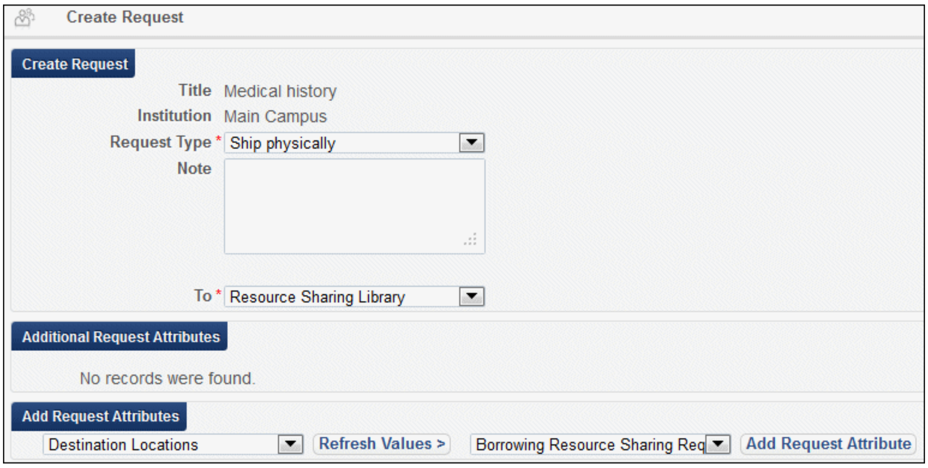


Figure 133: Create Request Page After Ship Physically Request

3 Configure the displayed fields, as described in the following table:

Table 14. Request Attribute Fields

Field	Description
Year (for journal requests)	Year of the request
Volume (for journal requests)	Volume of the request
Description (for journal requests)	Description of the request
Holding (for journal requests)	Click or to select a holding from the Holdings List page.
Manual description (for journal requests)	Enter a manual description for the request
Note	Enter notes as needed
To (for physical requests)	Select the specific library location (from a list predefined by an administrator) to which you want to move the item
Target destination (for digital requests)	Select the digitization department from the drop-down list

4 Add request attributes in the **Add Request Attributes** area.

a From the drop-down list, select an attribute and enter or choose a value for the attribute. Where relevant, select the check box to mark the attribute as **True**. Alma will then attempt to fulfill the request using any item that matches the selected attribute. For example, if a loan period attribute of **1 week loan** is selected, only one-week loans will be used by Alma to fulfill the request.

If you select **Date needed by**, click the calendar and select a date from the calendar pop-up window.

To remove an attribute value, click **Refresh Values**.

NOTE:
When creating a Patron digitization request and adding a Partial Digitization attribute, you can select the check box next to **Refresh Values** and click **Add Request Attribute** to add the Partial Digitization request attribute as **True**.

b Click **Add Request Attribute**.

The addional request attribute displays in the **Additional Request Attributes** area as shown in the following example.

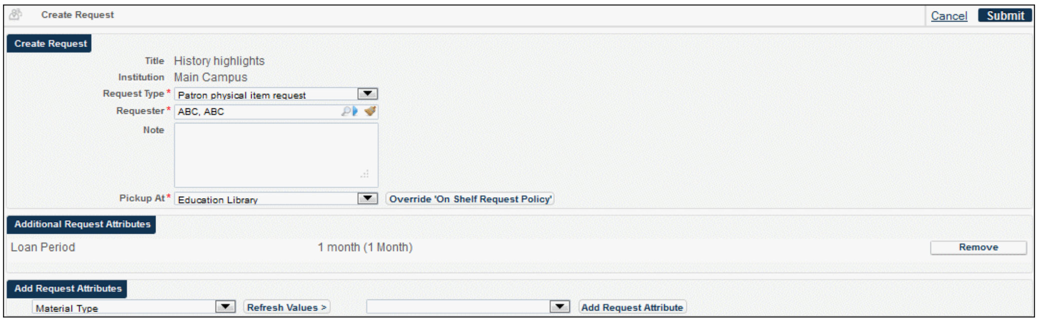


Figure 134: Additional Request Attributes

c Repeat this procedure for each attribute to be added to the request.

NOTE:
To remove an attribute, click **Remove** in the **Additional Request Attributes** area.

d Click **Submit**.

Rejecting a Lending Request

You can reject a resource sharing lending task for a variety of reasons. For example, if an item is already on loan or is not found in the library, you can reject the patron request.

To reject a lending request:

1 On the Resource Sharing Lending Requests Task List page (**Fulfillment > Resource Sharing > Lending Requests**), click **Reject** for a request. The Reject Request dialog box opens.

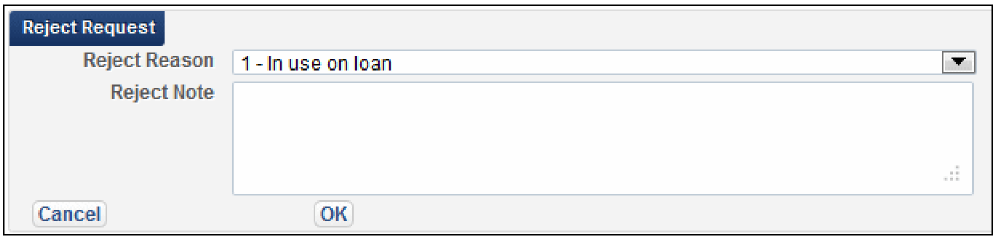


Figure 135: Reject Request Pop-up Window

2 Select a reason for the rejection in the **Reject reason** field.

3 Optionally, add a note for the rejection in the **Reject note** field.

4 Click **OK**. The request turns to the next partner in the request's rota (if one is configured – see Step 3 in Editing a Borrowing Request on page 146). If no partner is found, the request's citation status changes to **Rejected the lender request**, and the **Reject reason** and **Reject note** are displayed in the Notes tab for the request (click the **Edit** link for the request to view the Notes tab).

If the request is managed using an ISO partner, an **Unfill** message is sent to the borrowing library, which marks the partner request as **Rejected** (see Rejecting a Borrowing Request on page 153).

Shipping Resource Sharing Lending Request Resources

You can ship the resource sharing lending request item to the borrowing institution. The borrowing institution then delivers it to the patron who requested it.

To ship resource sharing lending request resources:

1 On the Scan In Items page (**Fulfillment > Resource Requests > Scan In Items**), ensure that you have selected a Resource Sharing library in the **Currently at:** field at the top of the page.

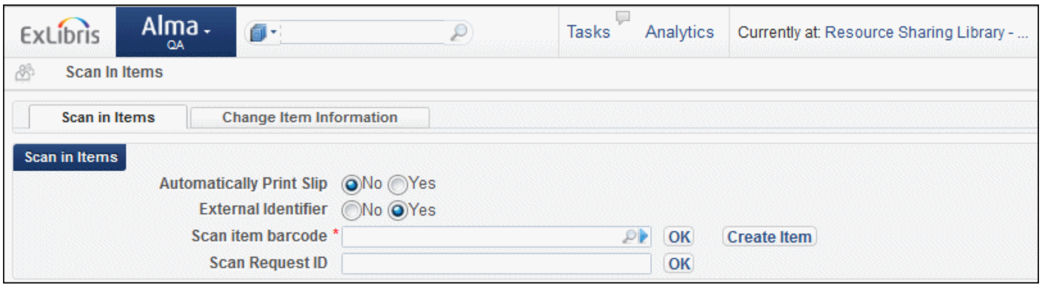


Figure 136: Scan In Items Page

2 In the **External Identifier** field, select **Yes**.

3 Scan an item barcode and a request ID of the resource sharing item in the relevant fields.

4 Click **OK**. The item is scanned into the Resource Sharing Library and displays at the bottom of the page. The item's status updates to **Shipped** and the item returns to its permanent shelf location.

Managing Resource Sharing Lending Tasks

You can manage Resource Sharing Lending tasks by performing the following:

- Removing Alerts on page 175
- Reassigning a Task on page 176

Removing Alerts

Alerts are attached to a resource sharing task during the main steps of a request's workflow. The alerts show that the request is in progress, and that something significant has happened during the process. Examples include:

- Citation Move Request in Process
- Citation Digitation Request Cancelled

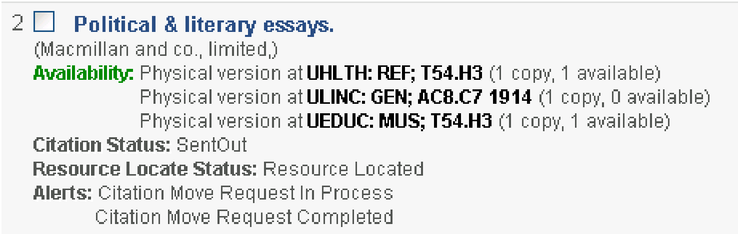


Figure 137: Example of Alerts

You can filter the displayed alerts by selecting an alert type from the **Alerts** drop-down list, or using the **Find** box at the top of the list.

To remove alerts:

1. On the Resource Sharing Lending Requests Task List page, select the check boxes of the tasks whose alerts you want to remove.
2. Click **Remove Alerts**.
3. Click **Confirm** in the Confirmation Message dialog box.

Reassigning a Task

You can reassign a task only if you are assigned the task or if it is unassigned.

To reassign a task:

1. On the Resource Sharing Lending Requests Task List page (**Fulfillment > Resource Sharing > Lending Requests**), click **Reassign** for the relevant task. The Assign To dialog box opens.

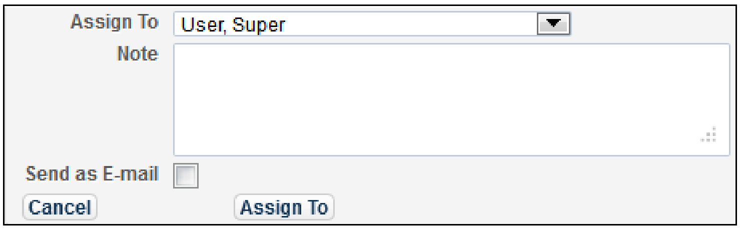


Figure 138: Assign To Dialog Box

2. From the **Assign to** drop-down list, select an operator.

NOTE:
The list of operators includes only those users who have the Fulfillment Services Operator role.

3 In the **Note** field, enter notes, as needed.

4 Select the **Send as e-mail** check box to notify the operator of the new assignment.

5 Click **Assign To**.

Receiving Items

PERMISSIONS:

To receive resource sharing items, you must have one of the following roles:

- Fulfillment Services Operator (for the resource sharing library)
- Fulfillment Services Manager (for the resource sharing library)

You can view a list of received resource sharing items on the **Received Items** page.

NOTE:

You can receive resource sharing items only when you have selected a resource sharing library circulation desk from the **Currently at**: field at the top of the page.

To view received items:

1 On the Received Items page (**Fulfillment** > **Resource Sharing** > **Receiving Items**), select a format for the received items in the **Received format** field that you want to view (**Digital**, **Physical**, or **Physical non-returnable**), regardless of which method you use to receive resource sharing materials.

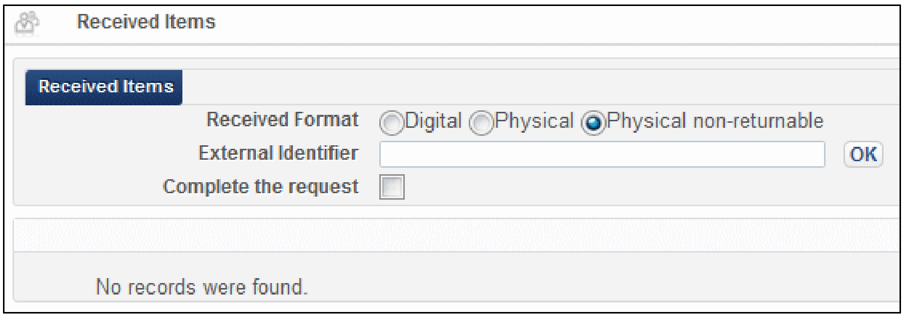


Figure 139: Received Items Page

2 Enter an external identifier for the received resource in the **External Identifier** field and click **OK**.

- If you selected **Physical** as the received format, a dialog box opens where you configure receiving information for the item:

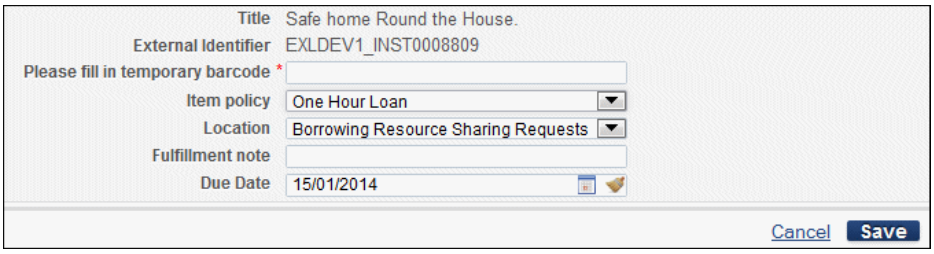


Figure 140: Receiving a Physical Item – Dialog Box

Configure the fields in the dialog box fields, as described in the following table:

Table 15. Receiving a Physical Item Dialog Box Fields

Field	Description
Temporary barcode	Enter the item's temporary barcode.
Item policy	Select an item policy for the item. For details on item policies, see **Configuring Item Policies** on page **291**.
Location	Select the location of where the item is to be received. When receiving an item from an NCIP partner, the value of this field is the value specified in the **Default Location** field on the Resource Sharing Partner page Parameters tab (see **Table 13** in the *Alma Integrations with External Systems Guide*).
Fulfillment note	Enter a note, as necessary.
Due date	Configure a due date for the item. If the NCIP Resource Sharing Borrowing Request message contains a due date, the date displays in this field. A due date that is in the past or is for a date by which the item cannot be delivered (for example, the item is due tomorrow and delivery takes 3 days for the item to arrive), the item must be handled accordingly (see **To handle a non-deliverable item and enable it for delivery:** on page **179**).

NOTE:

The values of the **Item policy** and **Location** fields are populated with the values of the Temporary Item Creation Rule for the item (see **Configuring Temporary Item Creation Rules** on page **260**). If no rule is configured, the

Item Policy field is empty and the **Location** field contains the current location of the item, based on the library and institution default settings.

- If you selected **Digital** as the received format, the received item displays at the bottom of the page.

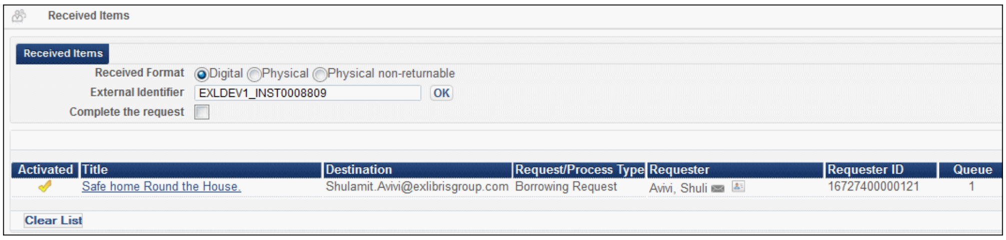


Figure 141: Received Items Page – Digital Item

Select **Complete the request** when you have completed the digital request to mark it as closed. If you do not select this option, the resource's status is listed in the Resource Sharing Borrowing Requests list as **Digitally received by library**. To check the item out to a patron and complete the request, select **Check out to patron**. The request status changes to **Request Completed**, and an entry is added to the **Audit** tab, indicating the status change and that the item was checked out to a patron.

When working with a physical non-returnable request, selecting **Complete the request** changes the item's status to **Request Completed** and the request is marked as **Closed**. If you do not select **Complete the request**, the resource's status is listed on the Resource Sharing Borrowing Requests page as **Physically received by library**.

VIDEO:

For more information about non-returnable requests, see the *Non-Returnable Borrowing Requests* video (4:26 mins).

3 If the lender is an ISO partner, the request’s status is updated and the **Received** message is sent.

To handle a non-deliverable item and enable it for delivery:

On the Received Items page, if a due date is entered for either a past date or a date by which the item cannot be delivered, a message displays indicating the item cannot be loaned:

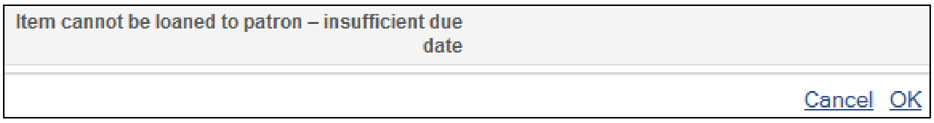


Figure 142: Insufficient Due Date Message

Do one of the following:

- Click **Cancel** to return to the Received Items page and modify the due date. When you fix the due date, the item displays on the Resource Sharing Borrowing Requests page with the status **Physically Received by Library**.

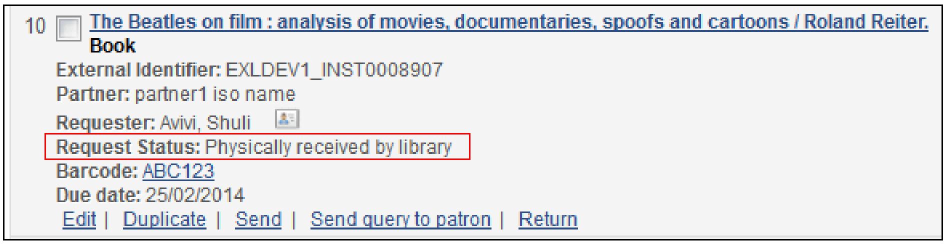


Figure 143: Physically received by library status

- Click **OK** to retain the insufficient due date. The item displays on the Resource Sharing Borrowing Requests page with the status **Received - not for loan**, indicating that the item has been received by the Resource Sharing Borrowing Library, but cannot be loaned.

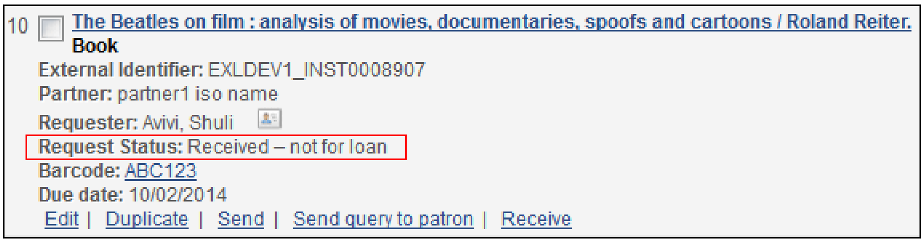


Figure 144: Received – not for loan status

Shipping Items

PERMISSIONS:

To ship resource sharing items, you must have one of the following roles:

- Fulfillment Services Operator (for the resource sharing library)
- Fulfillment Services Manager (for the resource sharing library)

You can configure items to be shipped from a lending institution, and you can update the due date and shipping cost simultaneously for multiple items being shipped together.

You configure items to be shipped on the Shipping Items page (**Fulfillment > Resource Sharing > Shipping Items**).

The fields displayed on the Shipping Items page depend on the selected Shipping Format.

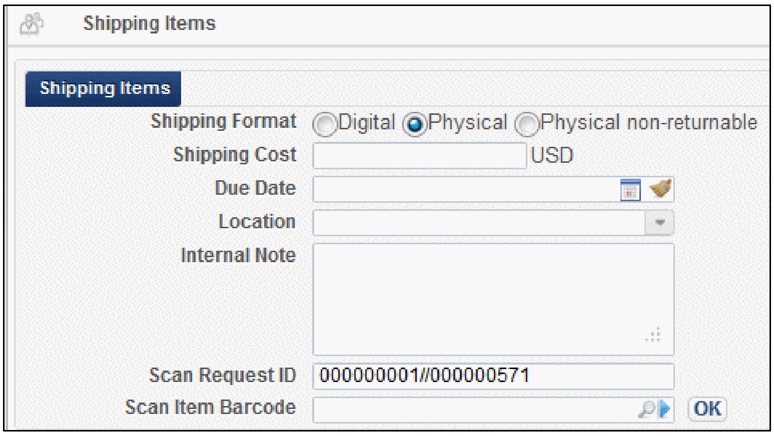


Figure 145: Shipping Items Page – Physical Item

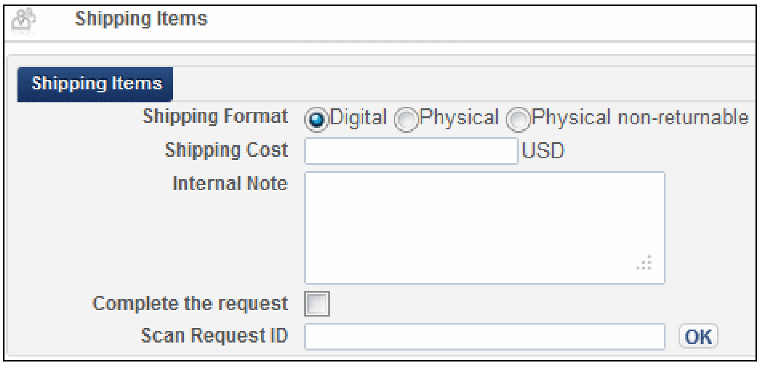


Figure 146: Shipping Items Page – Digital or Physical non-returnable Item

VIDEO:

For more information about shipping items, see the *Set Due Date and Shipping Costs at Ship Time* video (5:13 mins).

To set a due date and shipping cost for shipping multiple items from a lending institution:

1. On the Shipping Items page, locate the **Shipping Format** field and select the format in which the request is to be shipped.
2. In the **Shipping cost** field, enter a shipping cost for the item.
3. In the **Due date** field, enter a date by when the item must be shipped. This field displays only when **Shipping format = Physical**.
4. When shipping a resource sharing lending request, in the **Location** field, specify a temporary location for the item to be shipped. The options displayed in the **Location** field are the locations for the library that is specified in the **Currently at:** field.

   When specifying a location and entering the item's barcode in the **Scan item barcode** field, the request's status changes to **Shipped Physically**.

   This field displays only when **Shipping format = Physical**, and is enabled only when one of the following is true:

   - The **Currently at:** field displays a resource sharing library circulation desk.
   - You enter the External ID of a lending request in the **Scan Request ID** field.
   - You access the Shipping Items page via the **Ship Item** link on the Resource Sharing Lending Tasks List page.
5. In the **Internal Note** field, enter a note for the request.
6. In the **Scan item barcode** field, enter the item's barcode. This field displays only when **Shipping format = Physical.** When shipping an itemless request, leave this field blank.
7. Select the **Complete the request** check box to change the item's status to **Request Completed** and mark the request as **Closed**. This check box displays only when **Shipping format = Digital** or **Physical non-returnable**.
8. In the **Scan request ID** field, enter the item's external identification number.
9. Click **OK** next to either the **Scan item barcode** or **Scan request ID** fields. The item is located and displays on the bottom of the page.

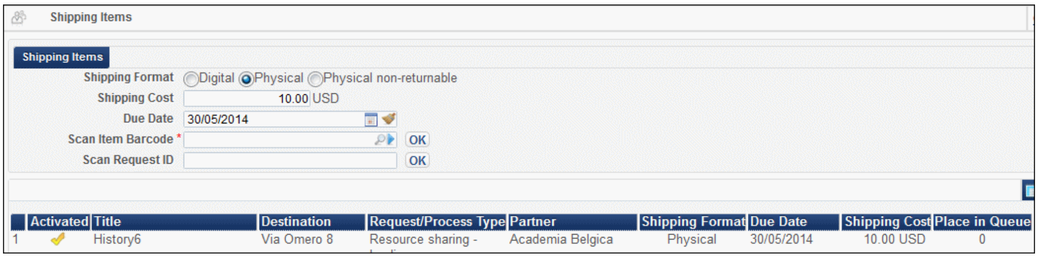


Figure 147: Shipping Items Page – Located Item for Shipping

Repeat Step **6** and Step **8** for all items you want to ship. The items display in the table at the bottom of the page, and the configured shipping cost and due date are applied to each of the items.

Configuring Partners

For information on configuring partners, refer to **Resource Sharing Requests** in the *Alma Integrations with External Systems Guide*.

Configuring Rota Templates

PERMISSIONS:

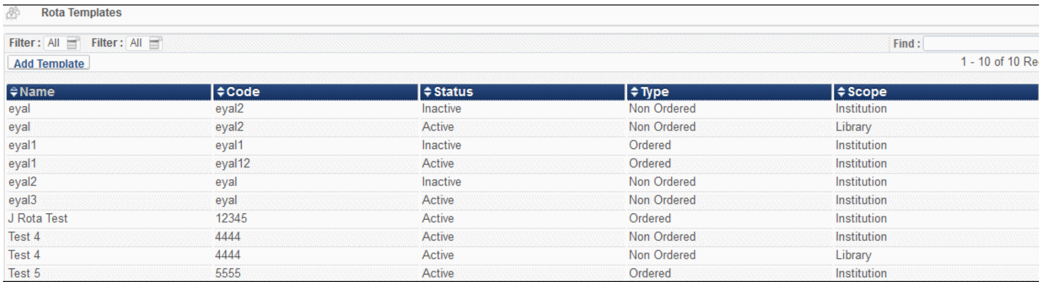
To configure rota templates, you must the following role:

- Resource Sharing Partners Manager

Alma enables you to create rota templates (groups of partners) which are used when processing borrowing requests during resource sharing. (For details on managing resource sharing borrowing requests, see **Managing Resource Sharing Borrowing Requests** on page **128**). Rota templates enable quickly attaching a group of partners to a borrowing request, instead of manually adding partners one-by-one.

Rota templates can be arranged either in an ordered or non-ordered list. An ordered list indicates that the unfulfilled request proceeds to the next partner in the list, while a non-ordered list sends the request to partners in the template randomly.

You configure rota templates on the Rota Templates page:



Rota Templates

Filter : All   Filter : All   Find :

Add Template   1 - 10 of 10 Re

Name	Code	Status	Type	Scope
eyal	eyal2	Inactive	Non Ordered	Institution
eyal	eyal2	Active	Non Ordered	Library
eyal1	eyal1	Inactive	Ordered	Institution
eyal1	eyal12	Active	Ordered	Institution
eyal2	eyal	Inactive	Non Ordered	Institution
eyal3	eyal	Active	Non Ordered	Institution
J Rota Test	12345	Active	Ordered	Institution
Test 4	4444	Active	Non Ordered	Institution
Test 4	4444	Active	Non Ordered	Library
Test 5	5555	Active	Ordered	Institution

Figure 148: Rota Templates Page

NOTES:

Rota templates can be configured at the institution or library level.

- To configure a template on the institution level, select the required institution from the **You are configuring** filter on the Fulfillment Configuration page.
- To configure a template on the library level, select the required library from the **You are configuring** filter on the Fulfillment Configuration page. Select **Actions > Duplicate** for an existing template; a copy of the selected template is created, with a scope value of **Library**.
- To configure a network template on the institution level, locate a template with a **Scope** value of **Network** and select **Actions > Duplicate**. The General Information page opens, where you can modify the parameters of the rota template. Click **Save** to save the template as an institution template (**Scope = Institution**). For details, see **Configuring Rota Templates and Rota Assignment Rules in the Network Zone** in the *Alma Consortia Guide*.

The following actions can be performed on this page:

- Adding rota templates (see **Adding Rota Templates**, below)
- Editing rota templates (**Actions > Edit**)
- Duplicating a rota template (**Actions > Duplicate**; available only when a library is selected in the **You are configuring** filter on the Fulfillment Configuration page).
- Reordering template members (**Actions > Reorder Members**; available for ordered templates only)
- Deleting rota templates (**Actions > Remove**)

VIDEO:

Learn about managing rota templates on the library and institution levels in the *Managing Rota Templates per Library and Institution* video (6:06 mins).

(Note that you need to be logged in to the Documentation Center in order to view this video.)

Adding Rota Templates

You can add both non-ordered and ordered rota templates.

To configure non-ordered rota templates for resource sharing requests:

1. On the Rota Templates page (**Fulfillment > Resource Sharing > Rota Templates**), click **Add Template**. The General Information page displays.

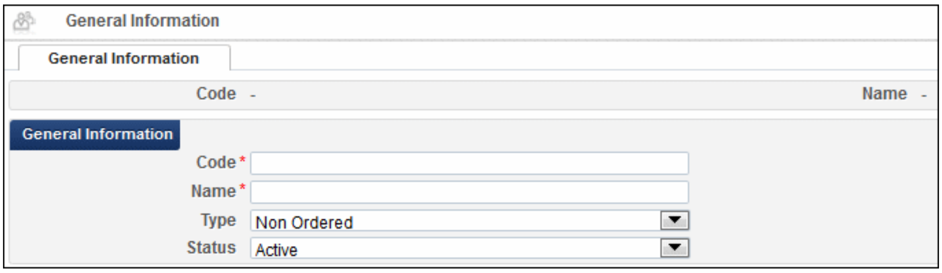


Figure 149: General Information Page

2. In the **Code** and **Name** fields, enter values for the template code and name, respectively.
3. In the **Type** field, select **Non Ordered**.
4. Click **Save and Add Members**. The Template Members page displays.

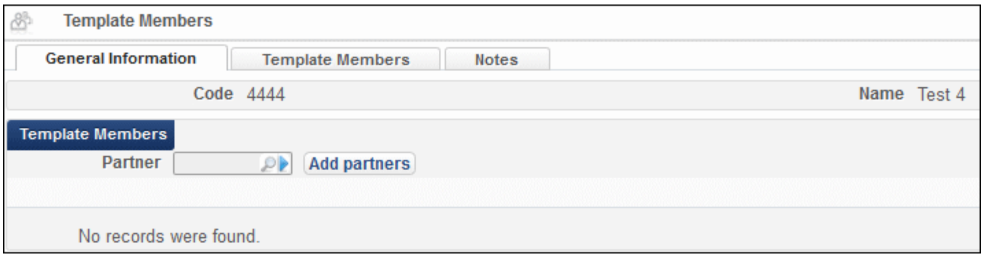


Figure 150: Template Members Page

5. Browse for a partner in the **Partner** field (you can select multiple partners) and click **Add Partners**. The selected partners are displayed in the table on the Template Members tab.

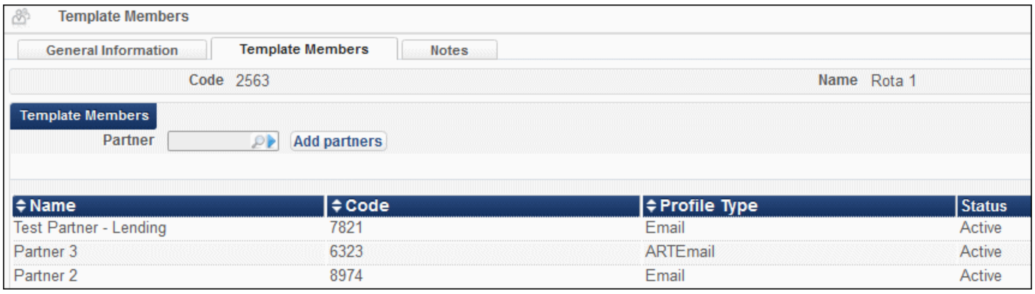


Figure 151: Template Members Tab

6 Click **Save**.

To configure ordered rota templates for resource sharing requests:

1 On the Rota Templates page (**Fulfillment > Resource Sharing > Rota Templates**), click **Add Template**. The General Information page displays.

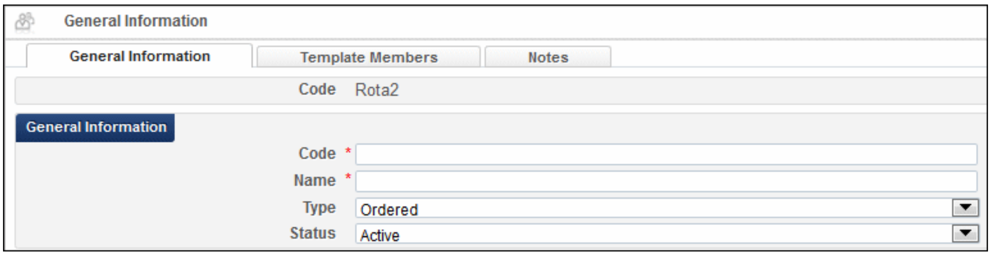


Figure 152: General Information Page

2 In the **Code** and **Name** fields, enter values for the template code and name, respectively.

3 In the **Type** field, select **Ordered**.

4 Click **Save and Add Members**. The Template Members page displays.

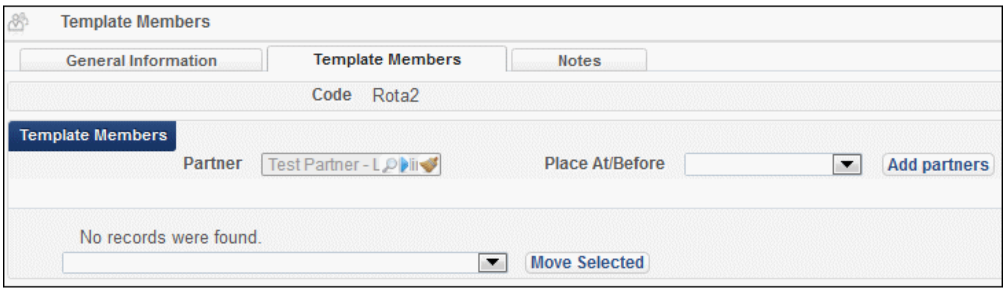


Figure 153: Template Members Page

5 Browse for a partner in the **Partner** field (you can select multiple partners) and click **Add Partners**. The selected partners are displayed in the table on the Template Members tab page.

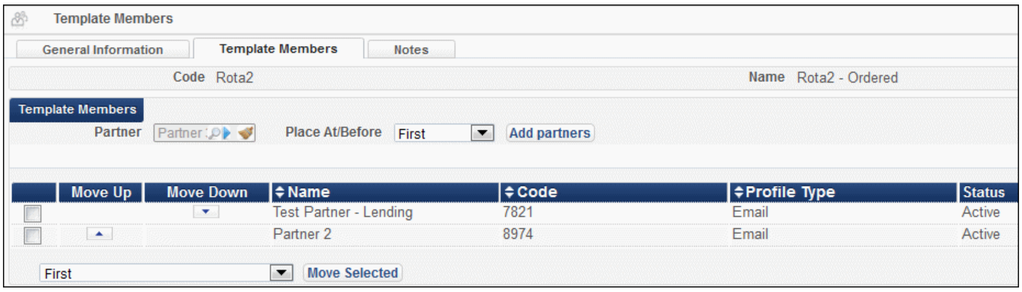


Figure 154: Template Members Tab

6 You can add new members by browsing for a partner in the **Partner** field and, in the **Place At/Before** field, select where in the list you want the selections to be placed.

Click **Add Partners**. The partners are displayed in the table according to your selection.

7 Modify the order of the partners in one of the following ways:

- Use the **Move Up/Move Down** arrows to specify the exact sequence of the partners to be displayed.
- Select partners and, in the drop-down list on the bottom of the page, choose the place in the list to which the selected partners are to be moved. Click **Move Selected**.

Partners receive unfulfilled resource borrowing requests according to their order in the rota.

8 Click **Save**.

6

Courses and Reading Lists

This section includes:

Courses and Reading Lists Workflow

Courses, reading lists, and citations can be managed manually using the Alma user interface, or via the Web services. This section describes the manual handling of these entities using Alma. For information on using the Alma Web services to handle these entities, see https://developers.exlibrisgroup.com/alma/apis/soap/course.

The diagram below illustrates the hierarchy of the **course**, **reading list**, and **citation** entities.

- **Citations** are the basic processing units. They are the reading list titles that must be processed (moved to and from reserved areas, digitized), or the faculty-owned copies that are part of the required reading list. Citations may be accessed via a course in the course list or via a reading list task list (which lists all the reading lists in the system, filtered by their assignment to specific operators).
- Citations are connected to one or more **reading lists**.
- A reading list is connected to a single **course**. (Note that a course can contain several reading lists—for example, reading lists that are processed by separate libraries.)

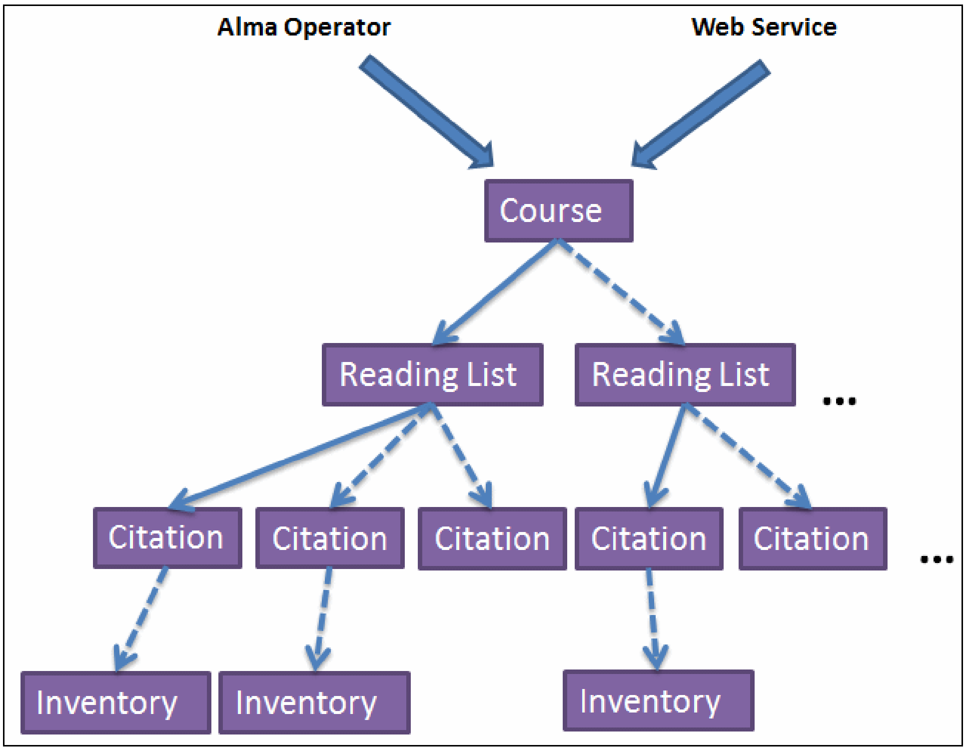


Figure 155: Hierarchy of Course, Reading List, and Citation Entities

The task of managing courses and reading lists includes the following elements:

1 Creating new courses, reading lists, and citations.

- For information on creating new courses, see **To add a course:** on page **192**.
- For information on creating new reading lists, see **Adding a Reading List** on page **198**.
- For information on creating new citations, see **Citation Types** on page **204**.

2 Preparing existing reading lists for the commencement of a course. This may be achieved by:

- Sending existing reading lists to the responsible faculty members for their comments. Reading lists may be exported using the **Tools** option on the Course's Reading List page (see **Managing Reading Lists** on page **196**). The reading lists can then be updated based on faculty feedback.
- Filtering the reading lists by citation status, to enable you to work on citations that require processing (for example, citations that are incomplete). For detailed information, see **Working with Citations** on page **205**.

- Fetching items from shelves to move them to reserved areas, or placing requests on remote items. For detailed information, see **Working with Citations** on page **205**.

3 Managing the end of a course using the reading list end dates. For detailed information on working with end dates, see **Managing Reading List Due Back Dates** on page **199**.

VIDEO:

For information on course reserves, see the *Course Reserves* video (1 hour 4:42 mins).

Managing Courses

PERMISSIONS:

To manage courses, you must have one of the following roles:

- Course Operator attached to a course department
- Course Manager attached to a course department
- Fulfillment Operator attached to a course department
- Fulfillment Manager attached to a course department

You manage courses on the Courses page. The Courses page lists all the courses that have been created for a department. You can locate specific courses using the **Find** box on the right side of the page, or via the **Processing Department**, **Status**, and **Term** filters on the left side of the page. Additionally, you can search for text in a specific course category by entering the text in the **Find** box and selecting the relevant category from the **in** drop-down list.

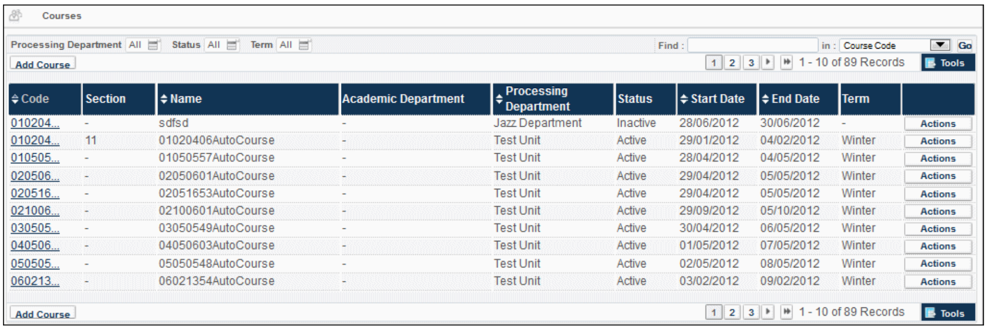


Figure 156: Courses Page

This section describes:

Adding a Course

When you add a course to a department, you define the attributes of the course. These include details such as the instructor, the term in which the course occurs, and weekly hours.

To add a course:

1 On the Courses page (**Fulfillment > Course Reserves > Courses**), click **Add Course**. The Manage Course Information page opens.

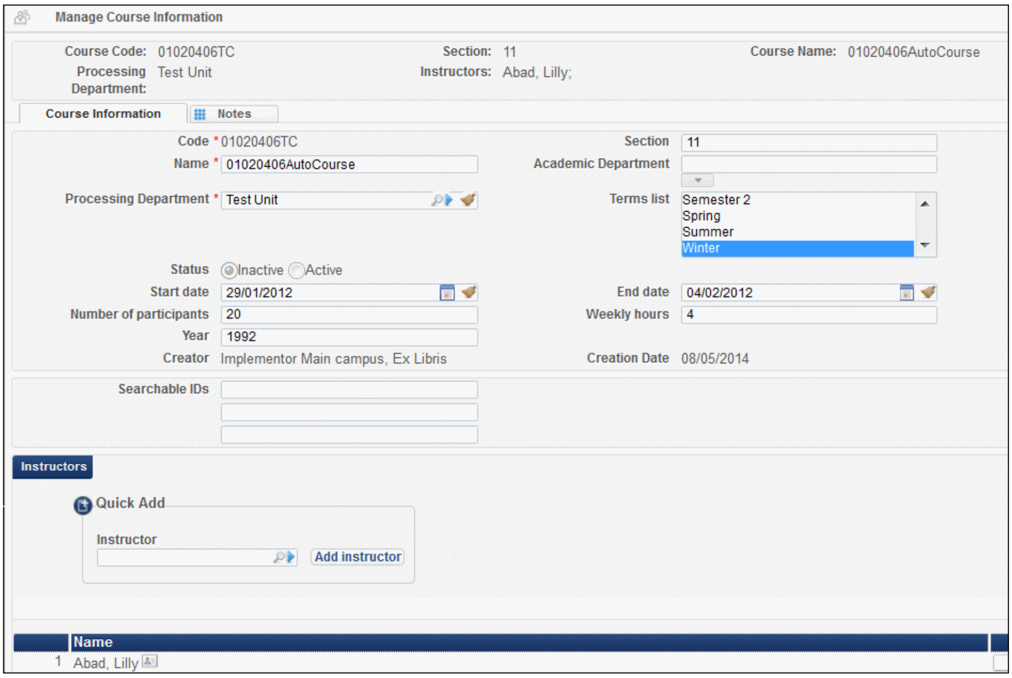


Figure 157: Manage Course Information Page

2 Enter the course information as required. A description of the fields is provided in the following table.

Table 16. Manage Course Information Fields

Field	Description
Code (Required)	The code to be assigned to the course
Name (Required)	The name to be assigned to the course
Processing department (Required)	Select the department that contains the course. Click **Browse** to open the Department List page and select a department predefined by an administrator (see **Configuring Processing Departments** on page 353)
Section	Courses can be divided into sections to better organize resources and activities for students. Each section may be taught by a different faculty member, have a separate description, and contain as many resources as the faculty member requires.
Academic department	Select the academic department that contains the course from a list predefined by an administrator (see **Configuring Academic Departments** on page 354)
Terms list	Select the term during which the course is to be taught from the **Terms list** drop-down list. Note that an administrator can delete and/or rename options in the list (**Fulfillment > Fulfillment Configuration > Configuration Menu > Courses > Course Terms**).
Status	Select the status of the course: ■ **Active –** indicates the course is currently being taught ■ **Inactive –** indicates the course has been taught, or will be taught, but is not currently being taught **NOTE:** Records linked to inactive courses are published without the course information.
Start date	Select the start date from the calendar dialog box. The current date is the default date.
End date	Select the end date from the calendar dialog box. This date cannot be earlier than the start date. **NOTE:** The course's end date is transferred to the course's reading lists.

Table 16. Manage Course Information Fields

Field	Description
Number of participants	The number of students that are enrolled in the course.
Weekly hours	The number of hours the course is taught per week.
Year	The year the course is given.
Searchable IDs	An additional ID for the course, used for search indexes in Primo and external systems. Alma allows you to add up to three searchable IDs.
Instructor	Browse for the instructor of the course, and click **Add Instructor**. The instructor displays on the bottom of the page. You can add multiple instructors for a course. When there are multiple instructors for a course, the **Instructor** column value on the Courses page is **Multiple**. Multiple instructors are listed by name in the header of the Course's Reading List page (**Fulfillment** > **Course Reserves** > **Courses**, select **Actions** > **Reading List** for a course).

3 Click **Save**. The course material is saved and the course displays on the Courses page.

NOTE:
The modification of course statuses as well as their activation/deactivation (and the ramifications thereof) is handled by the Activate/Deactivate Courses system job. For details, see **Table 15** in the *Alma Administration Guide*.

Editing a Course

You can modify the attributes of a course.

To edit a course:

1. On the Courses page, (**Fulfillment** > **Course Reserves** > **Courses**), click **Actions** > **Edit** for a course. The Manage Course Information page opens.
2. Modify the course information as required. A description of the fields on the Manage Course Information page appears in **Table 16**. You can also add notes in the Notes tab (see **Editing a Reading List** on page **201**).
3. Click **Save**.

Viewing a Course's Reading List

You can view the reading list associated with a course.

To view a course's reading list:

On the Courses page (**Fulfillment > Course Reserves > Courses**), select **Actions > Reading List** for a course. The Course's Reading List page opens, displaying the reading lists associated with the course.

For details on working with reading lists, see Managing Reading Lists on page 196.

Copying a Reading List and Adding it To a Course

You can copy a reading list from the Reading Lists Task List page and add it to a course.

To copy a reading list:

1 On the Courses page (**Fulfillment > Course Reserves > Courses**), select **Actions > Copy Reading List** for a course. The Reading Lists Task List page opens.

The Reading Lists Task List page displays all reading lists that have been defined for your institution. You can display a specific reading list using the **Find** box, or via the **Status** filter on the left side of the page.

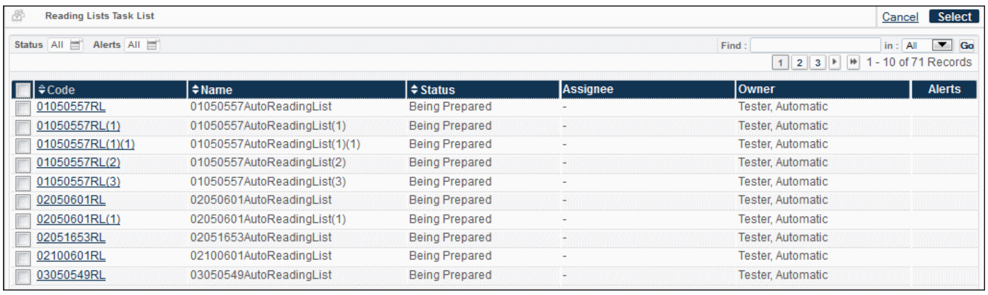


Figure 158: Reading Lists Task List Page

2 Select the check box of each reading list you want to add to the course and click **Select**. The reading lists are added to the course.

To view the added reading lists, select **Actions > Reading List** for the course. The course's reading lists are displayed on the Course's Reading List page.

Duplicating a Course

Duplicating a course creates a new course request based on an existing one. You can then modify the course parameters, as needed.

To duplicate a course:

1. On the Courses page (**Fulfillment > Course Reserves > Courses**), select **Actions > Duplicate** for a course. The Manage Course Information page opens. For details on the displayed fields, see **Table 16**.
2. Modify the relevant fields as required, and click **Save**. The new course is displayed on the Courses page.

Removing a Course

You can remove a course from the department.

To remove a course:

1. On the Courses page (**Fulfillment > Course Reserves > Courses**), click **Actions > Remove** for a course.

   A Confirmation Message dialog box opens.
2. Click **Confirm**. The course is deleted from the system.

Managing Reading Lists

PERMISSIONS:

To manage a course's reading list, you must have one of the following roles:

- Course Operator attached to a course department
- Course Manager attached to a course department
- Fulfillment Operator attached to a course department
- Fulfillment Manager attached to a course department

After adding a course, you can manage the reading lists for the course. A reading list is blank until you add content to it. A typical reading list includes textbooks, additional books, book chapters, journal articles, newspaper articles, or Web sites. Each item on the list is called a **citation**.

For information on citations, see **Managing Citations** on page **204**.

Reading lists can be accessed via their courses by selecting **Actions > Reading list** for a specific course on the Courses page, or via the Reading Lists Task List page (**Fulfillment > Course Reserves > Reading Lists**). On the Reading Lists Task List page, reading lists are managed based on personal assignment (Assigned to Me or Unassigned tabs) and not via their respective courses. Operators with the Fulfillment Services Manager role may change the assignment of a reading list. Note that you cannot process task lists that are managed by other operators. For more information on managing reading list assignment, see **Releasing and Reassigning a Reading List** on page **202**.

You can perform the following actions for reading lists:

- **Adding a Reading List** on page **198**
- **Viewing a Reading List** on page **200**
- **Editing a Reading List** on page **201**
- **Releasing and Reassigning a Reading List** on page **202**
- **Duplicating a Reading List** on page **203**
- **Deleting a Reading List** on page **203**

NOTE:

Reading lists can be exported into your course management system using the Alma Web services. For information the relevant Alma Web services, see https://developers.exlibrisgroup.com/alma/apis/soap/course.

You can locate specific reading lists using the **Find** box. In general, you manage reading lists using the **Status** and **Alerts** filters. For more information on these filters, see **Managing Citations** on page **204**.

Adding a Reading List

You can define one or more reading lists for a course, based on the reading list material identified by the course instructor. Each reading list is generally specific to a particular topic.

To add a reading list:

1 On the Courses page (**Fulfillment > Course Reserves > Courses**), select **Actions > Reading List** for the course to which you want to add a reading list**.** The Course's Reading List page opens.

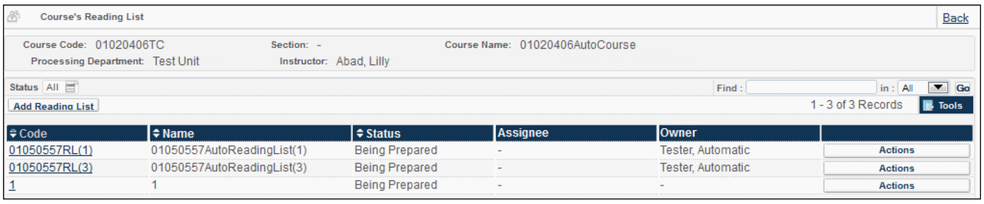


Figure 159: Course's Reading List Page

2 Click **Add Reading List**. The Add Reading List dialog box opens.

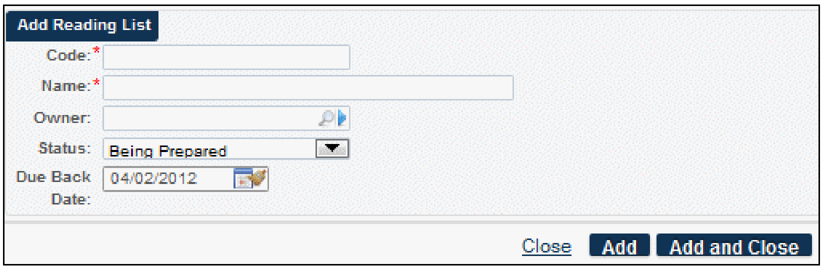


Figure 160: Add Reading List Dialog Box

3 Enter the reading list information. A description of the fields appears in the following table:

Table 17. Add Reading List Fields

Field	Description
Code (Required)	The code to be assigned to the reading list
Name (Required)	The name to be assigned to the reading list

Table 17. Add Reading List Fields

Field	Description
Owner	The owner is the person who submitted the list and who needs to be updated about the list. This may be the instructor, but may be an assistant who creates the list on the instructor's behalf (especially if there are multiple reading lists linked to the same course). Click **Browse** to open the Find and Manage Users page and select the owner of the reading list. For details on the Find and Manage Users page, see **Managing Users** in the *Alma Administration Guide*.
Status	Select a status for the reading list from the following statuses: ■ Being prepared ■ Ready for processing ■ Being processed ■ Complete ■ Inactive
Due back date	Select the due back date for the resources by clicking in the field and selecting a date from the dialog box. The default date is the course's end date. For details on managing a course's due back date, see **Managing Reading List Due Back Dates**, below.

4 Click one of the following:

- **Add –** Adds the reading list and leaves the dialog box open to configure additional reading lists
- **Add and Close –** Adds the reading list and closes the dialog box

The new reading list is added to the Course's Reading List page.

Managing Reading List Due Back Dates

An item shelved at a temporary location can be assigned a due back date either from the Change Item Information tab (see **Changing Item Information** on page **91**) or via the bulk items update job (see **Changing Loan Date in Bulk** on page **216**). However, when a reading list is attached to a course and an item is moved to a temporary location, the item's due back date is derived from the course's end date.

When a due back date arrives, an automatic job picks up items shelved at temporary locations and places a restore request on them. This triggers a process that moves the items back to their permanent location. (Note that at this stage, the descriptive record may be suppressed from publishing or deleted.)

The following procedure describes the process of managing the due back date when a reading list is attached to a course:

1. The reading list's due back date is by default identical to the course's end date. The due back date can be modified in the **Add Reading List** dialog box. For details on the fields displayed in the Add Reading List dialog box, see **Add Reading List Fields** on page **198**.
2. Citations are created in the reading list (see **Managing Citations** on page **204**).
3. If a move request is generated to temporarily move an item linked to a citation and the item moves to the specified location, the item automatically inherits the reading list's due back date and is labeled with it.
4. An automatic job picks up all temporarily moved items and places a Restore request to restore the items to their permanent location when the due back date arrives. For details on this job, see **Viewing Restore Request Jobs** on page **219**.

If a reading list citation is linked to an item with a due back date earlier than its own due back date, the **Actions > Update move expiry** option on the List of Items page advances the item's due back date to the due back date of the citation's reading list.

For example:

- The due back date of Item A is March 1
- The due back date of Citation B is April 1
- Citation B is temporarily linked to Item A

When selecting **Actions > Update move expiry** on the List of Items page (see **Figure 169**), the due back date of Item A updates to April 1.

Viewing a Reading List

When you view a reading list, you cannot make changes to it.

NOTE:
For information on accessing and managing reading lists, see the introductory section in **Managing Reading Lists** on page **196**.

To view a reading list:

On the Reading Lists Task List page (**Fulfillment > Course Reserves > Reading Lists**), click the relevant tab and select **Actions > View** for a reading list. The Edit Reading List page opens, displaying details of the reading list.

For details on editing a reading list, see **Editing a Reading List**, below.

Editing a Reading List

Once the reading list has been created, you can add the required reading material to it. You can select from resources in the repository, or use the system to suggest and locate an item. You can then edit a reading list to modify the material on the list.

NOTES:

- You can edit the reading list only if you are assigned the list, or if the list is unassigned.
- When you edit a reading list in the Assigned to Me or Unassigned tabs on the Reading Lists Task List page, the reading list is locked and cannot be edited by other library staff.

To edit a reading list:

On the Reading Lists Task List page (**Fulfillment > Course Reserves > Reading Lists**), select **Actions > Work on** for a reading list. The Edit Reading List page opens.

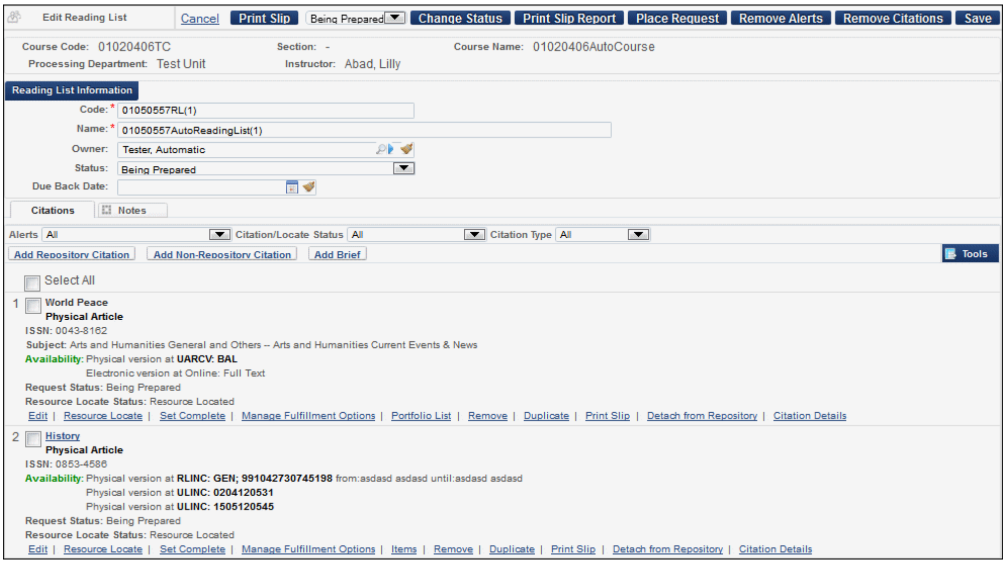


Figure 161: Edit Reading List Page

You can do the following on this page:

- Edit the reading list parameters. The reading list parameter fields are described in **Table 17**.
- Manage reading list citations, as described in **Managing Citations** on page **204**.

You can also add or edit notes in the **Notes** tab, as follows:

- To add a note, type your note in the **Note** field and click **Add**. The note is displayed in the list of notes on the page.

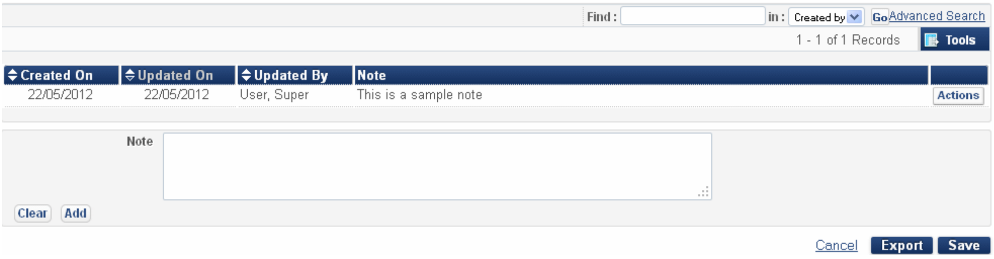


Figure 162: List of Notes - Notes Tab

- To edit a note, select **Actions > Edit** for the note that you want to update, modify the note on the Edit Note page, and click **Save.**
- To delete a note, select **Actions > Delete** for the note that you want to delete and click **Confirm** in the Confirmation Message pop-up window.
- To locate a note in the list of notes, enter the text for which you want to search in the **Find** box and select the field—**Created by**, **Modified by**, or **Note**—in which you want to search for the text.

NOTE:

The icon on the Notes tab indicates that information is available in the tab. The icon on the Notes tab indicates that there is no information in the tab.

After modifying the Edit Reading List page as required, click **Save**.

Releasing and Reassigning a Reading List

Reading lists are assigned to Fulfillment Operators. You can release an assigned reading list if your name is listed in the **Assignee** column of a reading list on the Reading Lists Task List page (see Figure 158). This removes the reading list from your tasks. You can leave the task unassigned, or assign it to another operator (see Releasing and Reassigning a Reading List on page 202).

To release an assigned reading list:

On the Reading Lists Task List page (**Fulfillment > Course Reserves > Reading Lists**), select **Actions > Release assignment**.

The reading list is moved to the **Unassigned** tab.

To reassign a reading list:

1. On the Reading Lists Task List page (**Fulfillment > Course Reserves > Reading Lists**), select **Actions > Reassign** for a reading list. The **Assign to** dialog box opens.

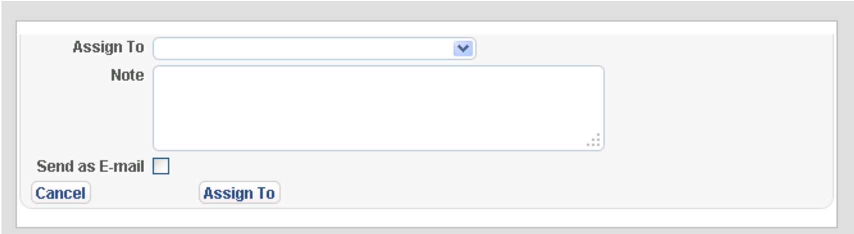


Figure 163: Assign To Dialog Box

2. In the **Assign to** drop-down list, select the user to whom you want to assign the reading list.
3. To notify the new assignee of the reading list task assignment, select **Send as e-mail**.
4. Click **Assign To**. The name of the new assignee for the reading list is displayed in the **Assignee** column.

Duplicating a Reading List

You can create a copy of a reading list and modify it, as needed.

To duplicate a reading list:

1. On the Reading Lists Task List page (**Fulfillment > Course Reserves > Reading Lists**), select **Actions > Duplicate** for a reading list. The Edit Reading List page opens.
2. Modify the reading list as needed. The fields on this page are described in Table 17.

Deleting a Reading List

You can permanently delete a reading list. If you delete a reading list while the course is active, any citation requests that have not been fulfilled are canceled. Those requests that have been fulfilled remain at the circulation desk until they are due back.

To delete a reading list:

1. On the Reading Lists Task List page (**Fulfillment > Course Reserves > Reading Lists**), select **Actions > Delete** for a reading list.
2. In the Confirmation Message dialog box, click **Confirm**.

   The reading list is deleted from the Course's Reading List page.

Managing Citations

Citations can be for books or articles, in either electronic or physical format, and must supply sufficient detail to uniquely identify the item. This includes author(s), date of publication, title, and page numbers. You can also use unique identifiers such as the International Standard Book Number (ISBN), a URL for a Web site, or specific volumes, articles, or other identifiable parts of a periodical.

NOTES:

- Since book chapters, journal articles, and conference papers are parts of larger documents, their titles may be different than the title of the entire document. Similarly, the authors may be different from the author or editor of the entire document. Their citations include details regarding the sources in which they appear.
- Citations that are linked to active courses are published to Primo with course information included. The following can be retrieved by a Primo search: course IDs, course names, and instructor names. Note that for this information to be published to Primo, the **Course information enrichment** check box must be selected in the Primo publishing profile.

Citation Types

Citations can be of one of the following types:

- Linked to the repository/inventory (refer to **Figure 155**) – The titles that are used for a course's reading list are part of the library inventory. (See **To add a repository citation:** on page **207**.)
- Not linked to the repository/inventory (refer to **Figure 155**) – The titles that are used for a course's reading list are standalone citations, with no link to the institution's inventory. These are typically faculty resources that are not part of the institution's inventory. (See **To add a non-repository citation:** on page **207**.)
- Briefly cataloged citations – The titles that are used for a course's reading list are cataloged by reading list operators. Inventory titles are created as a

result, so that these citations are essentially the same as those that are linked to inventory. (See **To add a brief record:** on page **208**.)

NOTE:
You can also create a citation for a reading list by scanning in an item and selecting the appropriate reading list in the Change Item Information tab. The item is added as a citation to the selected reading list. For details on the Change Item Information tab, see **Changing Item Information** on page **91**.

Working with Citations

You manage reading list citations on the Citations tab of the Edit Reading List page.

You can perform the following actions for a citation:

- Improve a citation's metadata (by clicking the **Edit** link beneath the citation). To locate a citation whose metadata may need to be enhanced, use the **Citation/locate status** filter. For information on configuring citation statuses, see **Configuring Additional Reading List Citation Statuses** on page **357**.
- Update a citation's status (by clicking the **Change Status** button at the top or bottom of the page). For information on configuring citation statuses, see **Configuring Additional Reading List Citation Statuses** on page **357**.
- Match a citation with your inventory and check how the citation can be made available to students (by clicking the **Resource locate** and **Manage fulfillment options** links beneath the citation). Alma attempts to locate inventory that matches the citation and if such inventory (in any format) is found, it is displayed with suggested request options.
  - If the inventory items are geographically far and/or you have no access to the shelves on which they are located, use the fulfillment options to place and then view requests. (See **To manage fulfillment options for a resource:** on page **210**.)

    In this case, for each step in the citation request workflow, an alert is generated — for example, **Citation Digitization Request In Process**, **Citation Digitization Request Completed**. You can use the **Alerts** filter to monitor the status of physical items that you have requested to move to reserved areas or material that you have requested in digital format. For example, you can use the **Alerts** filter to view only those citations whose request processing has been completed (in order to mark their status as Complete).
  - If the inventory items are geographically nearby and/or you have access to them, you can fetch the items from the shelves by clicking the **Print slip** link beneath a citation to print a slip for the specific citation, or the

Print Slip Report button to create a list of all the citations that are to be fetched from the shelves. Use the Change Item Information tab to temporarily change the item location, as described in **Changing Item Information** on page **91**.

Actions can be performed on multiple citations by selecting the check boxes of the relevant citations and clicking the relevant button at the top or bottom of the page, or on individual citations by clicking the relevant link beneath a citation, as described in the following table.

Table 18. Citation Links

Link	Description
Edit	Opens the Edit Reading List Citation page. Modify the information as required and click **Save** (see **Editing a Reading List** on page **201**).
Resource locate	Locates the citation's resource in the repository after editing the citation.
Set complete	Changes the citation status to **Complete**.
Manage fulfillment options	Opens the Manage Resource Options page (see **To manage fulfillment options for a resource:** on page **210**). Available only if a resource has been specified.
Remove	Opens a confirmation dialog box. Click **Confirm** to remove the citation.
Duplicate	Opens the Edit Reading List Citation page where you can modify the citation parameters as needed (see **Duplicating a Reading List** on page **203**).
Print slip	Prints a call slip for the citation. Available only if a resource has been specified.
Detach from repository	Removes the citation from the bibliographic record to which it is attached. After performing this action, the citation is not connected to any inventory. Available only if a resource has been specified.
Citation details	Opens a dialog box displaying information on the citation.

To add a repository citation:

1. On the Edit Reading List page (see **To edit a reading list:** on page **201**) in the **Citations** tab, click **Add Repository Citation**. The Repository Search page opens.

Figure 164: Repository Search Page

2. Enter the search criteria and click **Go**. You must select one of the titles values in the **Find** box (**All titles**, **Physical titles**, **Electronic titles**, or **Digital titles**). The Repository Search page displays records that match the search criteria. For more information on the Repository Search, see **Using the Repository Search** in the *Alma Resource Management Guide*.
3. Select the citation item you want to add, and click **Select**. The new citation displays in the **Citations** tab of the Edit Reading List page.

To add a non-repository citation:

1. On the Edit Reading List page (see **To edit a reading list:** on page **201**) in the **Citations** tab, click **Add Non-Repository Citation**. A dialog box opens.
2. In the **Citation type** field, select the type of citation:
   - Book
   - Article

   Click **Choose**. The Edit Reading List Citation page opens and displays fields for the selected citation type (see **Figure 165** and **Figure 166**).

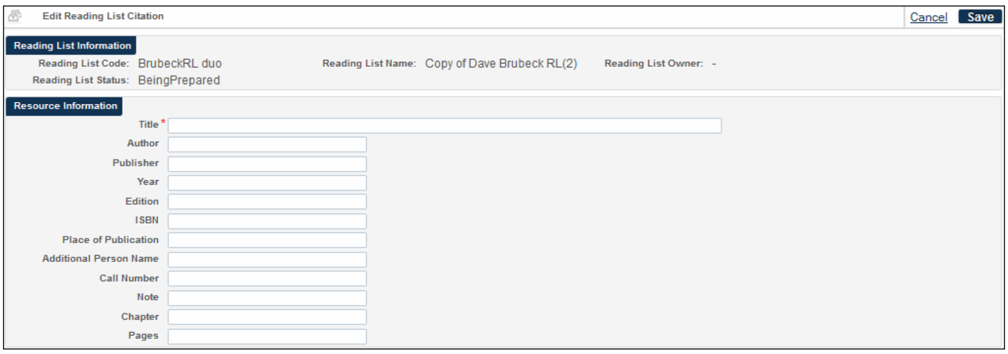


Figure 165: Edit Reading List Citation Page for a Book

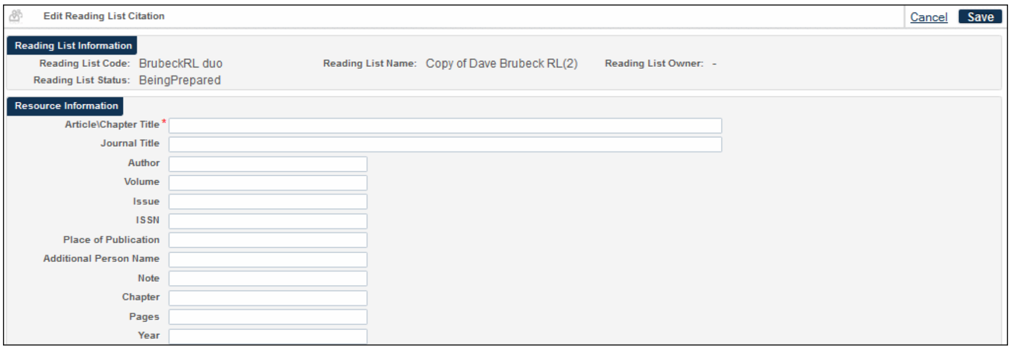


Figure 166: Edit Reading List Citation Page for an Article

3 In the **Resource Information** area, enter the necessary information in the displayed fields. A description of the fields appears in **Table 10** in **Manually Adding a Request** on page **135**.

4 Click **Save**. The new citation displays on the Edit Reading List page.

5 Click **Resource locate** on the Edit Reading List page to have Alma locate a resource for the new citation.

To add a brief record:

1 On the Edit Reading List page (see **To edit a reading list:** on page **201**) in the **Citations** tab, click **Add Brief**.

2 In the dialog box that opens, select the type of citation you want to create—physical book/article or electronic book/article—and click **Choose**. The Quick Cataloging page opens.

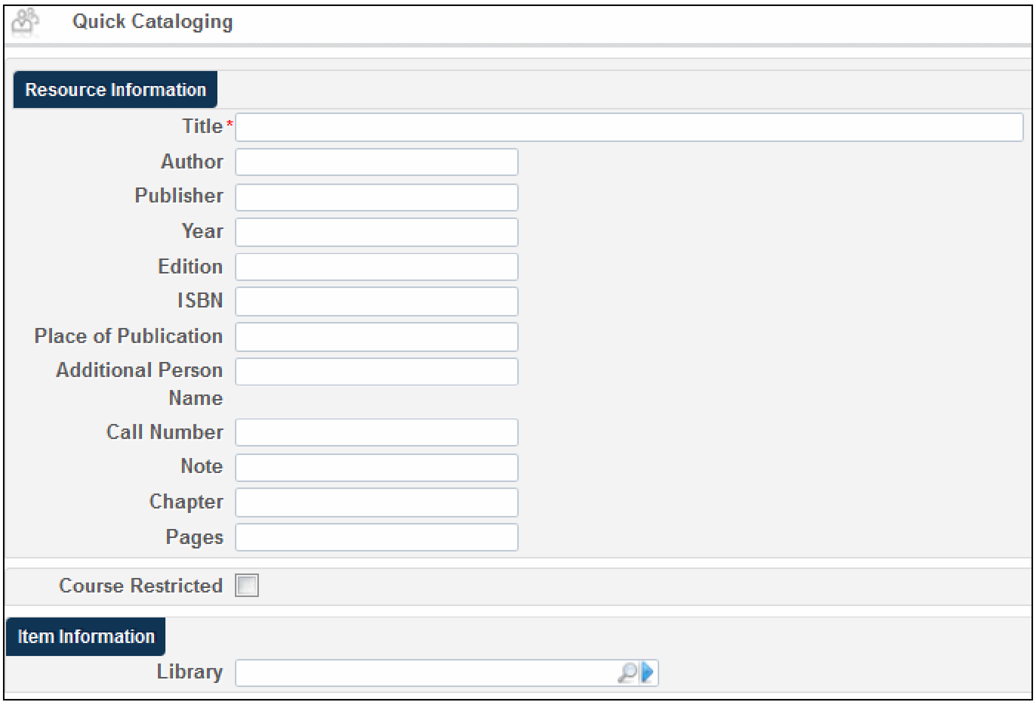


Figure 167: Quick Cataloging Page – For Physical Book

3 Configure resource and item information (where applicable) and click **Save**. New inventory is created and the new citation displays in the **Citations** tab of the Edit Reading List page.

NOTES:

- Select the **Course restricted** check box if you want the citation to be searchable in Primo only within a Courses search scope (once you set up the appropriate Primo search rules). Note that the appearance of this check box is dependent upon a value being stipulated for the `course_restricted_field` parameter (**Resource Management > Resource Configuration > Configuration Menu > General > Other Settings**).
- It is possible in Alma to use defined subfield separators, such as dollar dollar $$ or double dagger ‡. The type that is defined as the subfield separator must also be stipulated as the value for the `course_restricted_field` parameter.
- The `course_restricted_bib_date_will_be_deleted` parameter (**Resource Management > Resource Configuration > Configuration Menu > General > Other Settings**) indicates whether the published course data will be deleted (**true**) or suppressed (**false**, which is the default) from Primo when the course becomes inactive.

To manage fulfillment options for a resource:

On the Edit Reading List page (see **To edit a reading list:** on page **201**) in the **Citations** tab, click the **Manage fulfillment options** link below the citation. The Manage Resource Options page opens.

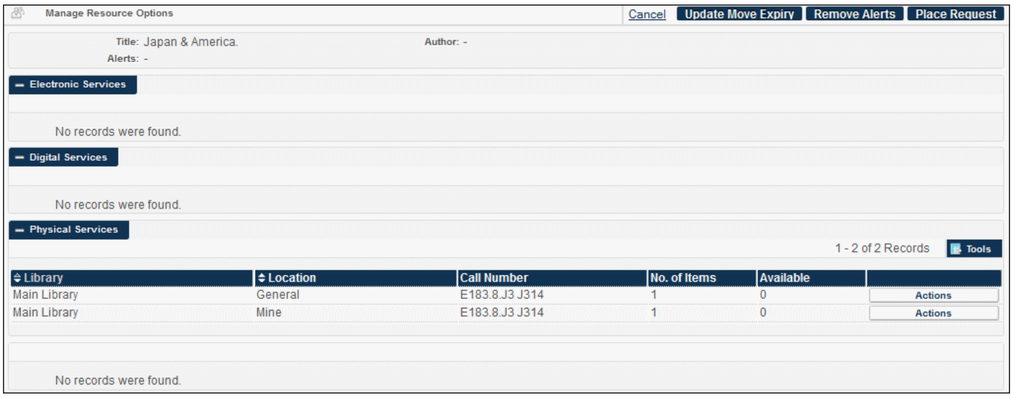


Figure 168: Manage Resource Options Page

- To view items, select **Actions > View items**. The List of Items page opens.

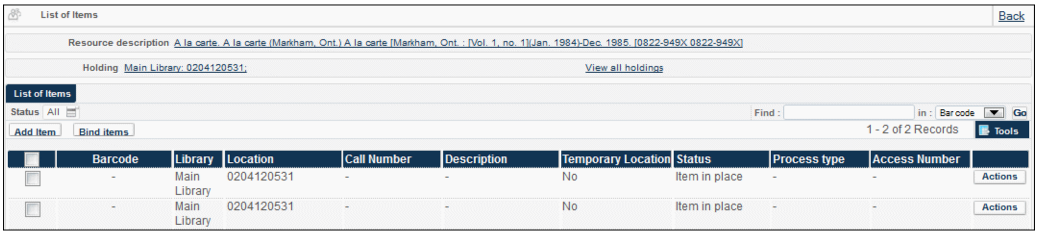


Figure 169: List of Items Page

For more information about the List of Items page, see **Using the List of Items** in the *Alma Resource Management Guide*.

- To create a request, select **Actions** > **Request**, or click **Place Request**. The Create Request page opens (see **Figure 5**). Select a request type (as described in **Creating a Request** on page **16**) and click **Submit**.
- To update the item's due back date so that it matches the due back date of the reading list (when the reading list's due back date is later than that of the item), select **Actions > Update move expiry**.

7

Advanced Tools

This section includes:

Viewing Fulfillment Configuration Information

PERMISSIONS:

To view fulfillment configuration information, you must have one of the following roles:

- Fulfillment Services Manager
- Fulfillment Administrator
- User Manager
- Circulation Desk Operator
- Circulation Desk Manager

Additionally, you can contact Ex Libris Support to enable the following roles to access this functionality:

- Circulation Desk Operator Limited
- Fulfillment Services Operator

You can view fulfillment configuration information for a specific item. The Fulfillment Configuration Utility displays the information that would take effect if a specified item were loaned to a specified patron, as follows:

- The Fulfillment Unit Name, Fulfillment Unit Rule, and TOU associated with the item.
- The due date calculated by the system if the specified item would be loaned to the indicated patron.
- The overdue fine for an item returned after its due date.

You can also access this information when viewing a patron's loan information on the Patron Services page, by selecting **Actions > View Policies** for a loan (see **Loaning Items** on page 43).

VIDEO:
For more information about the fulfillment configuration utility, see the *Fulfillment Configuration Utility* video (4:49 mins).

To view fulfillment configuration information:

1 On the Fulfillment Configuration Utility page (**Fulfillment > Advanced Tools > Fulfillment Configuration Utility**), search for a patron in the **Patron identifier** field. After selecting a patron, the patron's ID displays in this field.

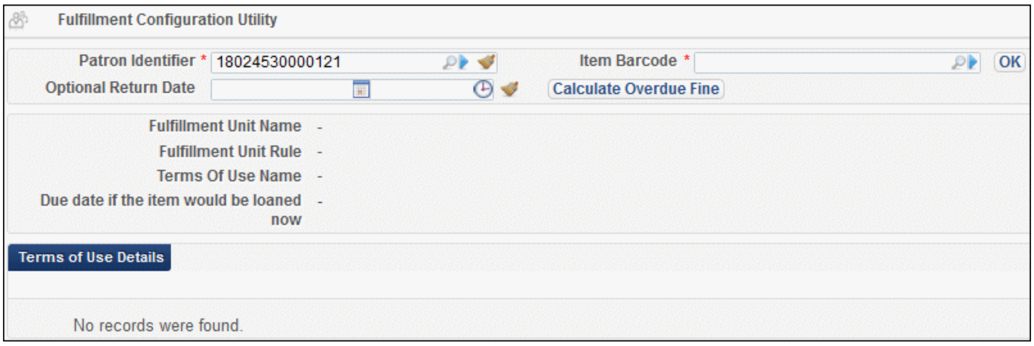


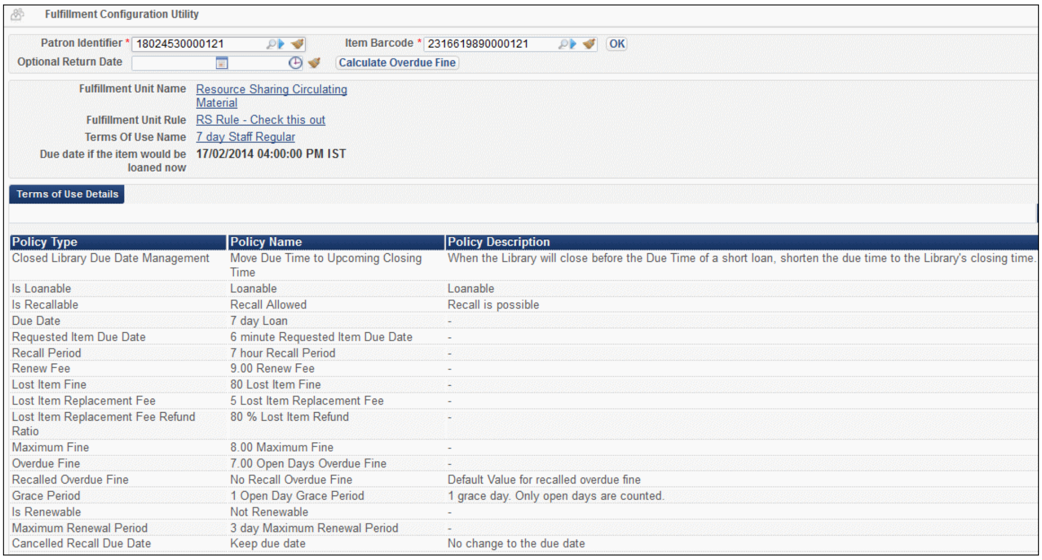
Figure 170: Fulfillment Configuration Utility Page

NOTE:
If accessing this utility from a patron's loan list, the borrower's id displays in the **Patron identifier** field, and the item's due date displays next to **Due**

date if the item would be loaned now in the list above the **Terms of Use Details** section.

2 In the **Item barcode** field, search for an item. After selecting an item, the item's barcode displays in this field.

3 Click **OK**. The due date for the specified item and patron displays next to **Due date if the item would be loaned now**, and the Terms of Use for the item and patron displays on the bottom of the page.



Policy Type	Policy Name	Policy Description
Closed Library Due Date Management	Move Due Time to Upcoming Closing Time	When the Library will close before the Due Time of a short loan, shorten the due time to the Library's closing time.
Is Loanable	Loanable	Loanable
Is Recallable	Recall Allowed	Recall is possible
Due Date	7 day Loan	-
Requested Item Due Date	6 minute Requested Item Due Date	-
Recall Period	7 hour Recall Period	-
Renew Fee	9.00 Renew Fee	-
Lost Item Fine	80 Lost Item Fine	-
Lost Item Replacement Fee	5 Lost Item Replacement Fee	-
Lost Item Replacement Fee Refund Ratio	80 % Lost Item Refund	-
Maximum Fine	8.00 Maximum Fine	-
Overdue Fine	7.00 Open Days Overdue Fine	-
Recalled Overdue Fine	No Recall Overdue Fine	Default Value for recalled overdue fine
Grace Period	1 Open Day Grace Period	1 grace day. Only open days are counted.
Is Renewable	Not Renewable	-
Maximum Renewal Period	3 day Maximum Renewal Period	-
Cancelled Recall Due Date	Keep due date	No change to the due date

Figure 171: Fulfillment Configuration Utility Page – Terms of Use

4 In the **Optional Return Date** field, enter a date and time to return the item and click **Calculate Overdue Fine**. The **Overdue fine for given return date** displays, indicating the fine that would be accrued if the item were returned on the indicated date and time.

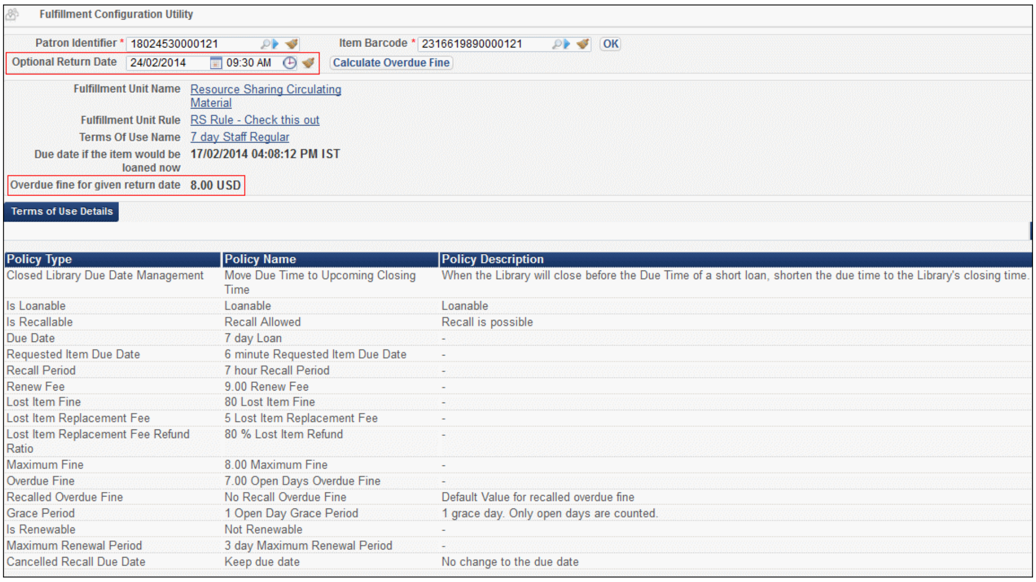


Figure 172: Fulfillment Configuration Utility Page – Overdue Fine for Given Return Date

5 Optionally, you can perform the following actions for the item:

- Click the link next to **Fulfillment Unit Name** to view and edit the item's fulfillment unit.
- Click the link next to **Fulfillment Unit Rule** to view and edit the item's fulfillment unit rule.
- Click the link next to **Terms of Use Name** to view and edit the item's TOU.

NOTE:

The Fulfillment Configuration Utility (**Fulfillment > Advanced Tools > Fulfillment Configuration Utility**) displays a loan's due date based on the fulfillment policy and does not take into account any potential overriding factors, such as the patron's expiration date. During the actual due date calculation, if the patron’s expiration date is earlier than the due date indicated by the fulfillment configuration policy, the item’s due date follows the patron’s expiration date. For example, if the fulfillment configuration policy indicates that an item is due in 6 weeks, but the patron’s expiration date is in 4 weeks, the item must be returned in 4 weeks.

Managing Fulfillment Sets

PERMISSIONS:

To manage fulfillment sets, you must have the following role:

- Fulfillment Administrator

You create fulfillment item sets on which you can run processes. Any process with a **Physical item** content type can be run on fulfillment item sets (see **Running Jobs on Defined Sets** in the *Alma Administration Guide*).

Fulfillment sets are created on the Manage Fulfillment Sets page. This section describes how to create and administer fulfillment item sets.

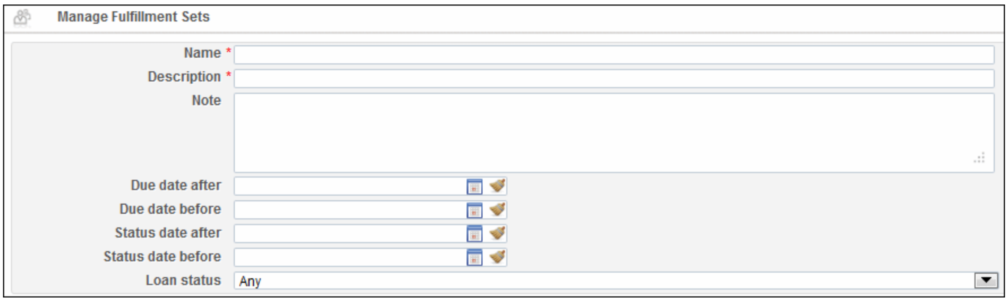


Figure 173: Manage Fulfillment Sets Page

To create fulfillment sets:

1 On the Manage Sets page (**Fulfillment > Advanced Tools > Create Fulfillment Sets**), enter the relevant information in the displayed fields, as described in the following table.

Table 19. Manage Sets Fields

Field	Description
Name (Required)	Name of the set.
Description (Required)	Description of the set.
Note	Notes about the set.
Due date after	Loaned items with a due date after the indicated date are included in the set.
Due date before	Loaned items with a due date before the indicated date are included in the set.

Table 19. Manage Sets Fields

Field	Description
Status date after	Loaned items whose status has changed after the indicated date are included in the set.
Status date before	Loaned items whose status has changed before the indicated date are included in the set.
Loan status	Loaned items whose status matches the indicated status are included in the set.

2 Click **Save**. The set is saved and the fields on the Manage Sets page are cleared, enabling you to create another fulfillment set.

To view your fulfillment sets:

On the Manage Fulfillment Sets page, click **View My Sets**. The My Sets tab is displayed.

Figure 174: Manage Sets Page

You can filter the displayed sets by selecting the relevant criteria from the **Filter** drop-down list.

Sets are displayed in the following tabs:

- **My Sets** – The sets that you have saved, both private and public
- **Public Sets** – Saved sets not marked as private
- **All Sets** – All saved public queries, created both by you and other users

For information on managing and adding sets, see **Managing Search Queries and Sets** in the *Alma Resource Management Guide*.

Changing Loan Date in Bulk

PERMISSIONS:

To change due dates in bulk, you must have the following role:

- Fulfillment Administrator

This section describes how to change the date for all items in a library that are due within the same date range (From/To).

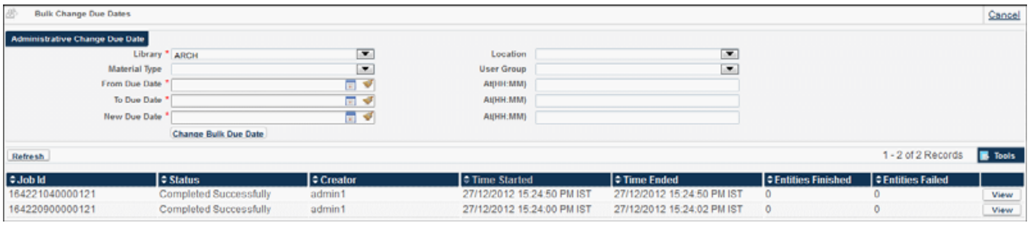


Figure 175: Bulk Change Due Date Page

To change loan due dates in bulk:

1 On the Bulk Change Due Date page (**Fulfillment > Advanced Tools** > **Bulk Change Due Dates**), enter the relevant information in the displayed fields, as described in the following table.

Table 20. Bulk Change Due Date Fields

Field	Description
Library (Required)	Select the library (from a list predefined by an administrator; see **Configuring Libraries** on page **237**) whose items' due dates you want to change.
Location	Select a location (from a list predefined by an administrator; see **Configuring Physical Locations** on page **265**) within the specified library.
Material type	Select a type of item within the specified library.
User group	Select a user group for which you want to change the due date.
From due date (Required)	Select the beginning date range from the calendar dialog box and optionally, enter a time in the **At** field. **NOTE:** If the corresponding **At** field is not specified, the time is set to 00:00.
To due date (Required)	Select the end date range from the calendar dialog box and optionally, enter a time in the **At** field. **NOTE:** If the corresponding **At** field is not specified, the time is set to 23:59.

Table 20. Bulk Change Due Date Fields

Field	Description
New due date (Required)	Select the new **To** due date from the calendar dialog box and optionally, enter a time in the **At** field.

2 Click **Change Bulk Due Date**. The list of jobs and their statuses are displayed in the table on the bottom of the page.

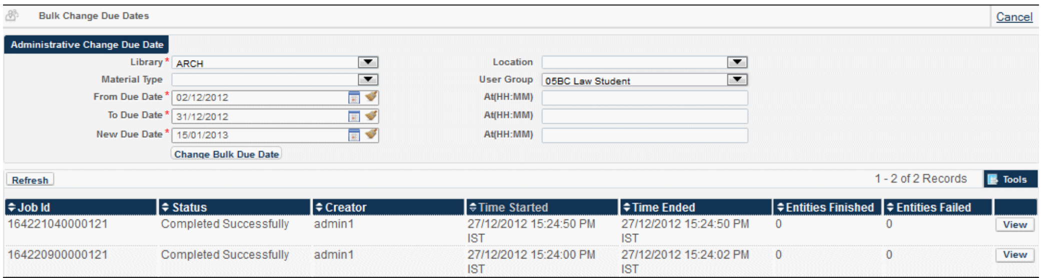


Figure 176: Bulk Change Due Date Page – Results

The Bulk Change Due Date page displays the columns containing information on the bulk change jobs that have run. The displayed columns are described in the following table:

Table 21. Bulk Change Due Date Columns

Column	Description
Job ID	A numerical identification number of the job
Status	The status of the job
Creator	The user who created the job
Time Started	The date and time on which the job started
Time Ended	The date and time on which the job ended
Entities Finished	The number of items in the job for which the due date change completed successfully
Entities Failed	The number of items in the job for which the due date change failed

Click **View** to view a report of the job. The Job Report page opens, displaying job details.

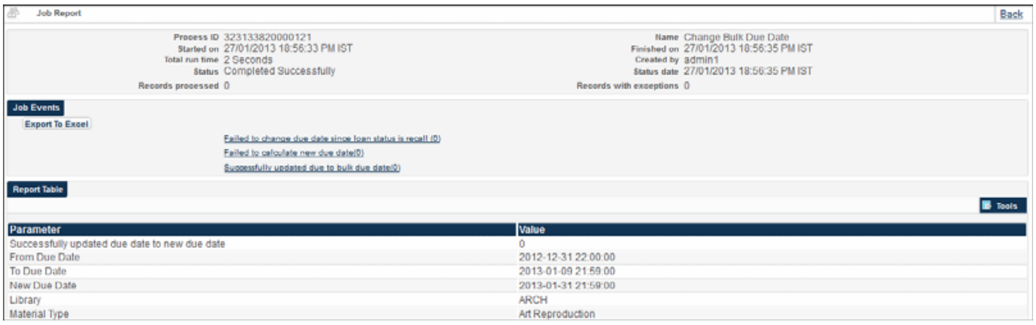


Figure 177: Job Report Page

Click **Export to Excel** to export the report data to Excel for analysis.

Viewing Restore Request Jobs

PERMISSIONS:

To view jobs that restore items that were temporarily moved, you must have the following role:

- Fulfillment Services Operator

A system job runs nightly to create restore requests (request type = restore item) on all of the institution's temporarily shelved items whose due back date is the current day or earlier so that these items can be restored to their permanent locations by the circulation desk operators at these locations.

These items may include the following:

- Reading list items for a course that has ended
- Items that were removed temporarily, such a resource that was removed while a course is ongoing and the resource is now due to be returned

The list of jobs is displayed on the List of Restore Jobs page.

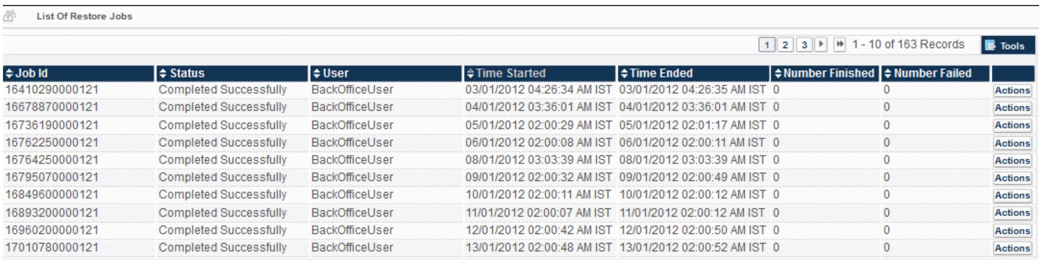


Figure 178: List of Restore Jobs Page

To view a restore job:

On the List of Restore Jobs page (**Fulfillment** > **Advanced Tools > View Restore Request Jobs**), select an action for a restore job from the **Actions** menu, as follows:

- **View** – Opens the Job Report page, displaying details of the job, including its status and the number of items processed successfully and unsuccessfully.

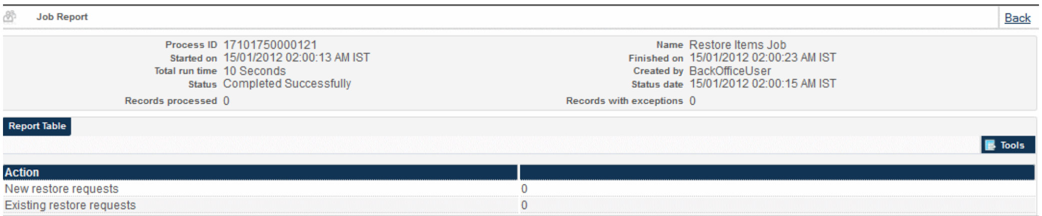


Figure 179: Job Report Page

- **Events** – Opens the Events Report page, displaying details of the events that occurred during the job processing.

Figure 180: Events Report Page

Viewing Lost Loan Jobs

PERMISSIONS:

To view lost loan jobs, you must have the following role:

- Fulfillment Administrator

You can create an automated, recurring daily batch job for processing lost loans (see **Configuring Overdue and Lost Loan Profiles** on page **311**). You can view and monitor the created lost loan jobs on the List of Change Loan to Lost Job page.

List of Change Loan to Lost Job

1 - 3 of 3 Records Tools

Job ID	Status	User	Time Started	Time Ended	Number Finished	Number Failed	
26797070000121	Completed Successfully	System	24/12/2012 18:00:01 IST	24/12/2012 18:01:41 IST	0	0	View
26795920000121	Completed Successfully	System	29/11/2012 18:00:11 IST	29/11/2012 18:00:24 IST	0	0	View
18760230000121	Completed Successfully	System	05/08/2012 13:38:08 IDT	05/08/2012 13:39:49 IDT	0	0	View

Figure 181: List of Change Loan to Lost Job Page

To view lost loan job details:

On the List of Change Loan to Lost Job page (**Fulfillment** > **Advanced Tools > View Lost Loan Jobs**), click **View** for the specific lost loan job you want to view. The Job Report page opens, displaying the job details.

Job Report Back

Process ID	26797070000121	Name	Loans - Change to Lost
Started on	24/12/2012 18:00:01 IST	Finished on	24/12/2012 18:01:41 IST
Total run time	1 Minutes 40 Seconds	Created by	System
Status	Completed Successfully	Status date	24/12/2012 18:01:41 IST
Records processed	0	Records with exceptions	0

Figure 182: Job Report Page

Offline Circulation

PERMISSIONS:

To import offline circulation files, you must have the following role:

- Circulation Desk Operator

Loans and returns can be performed when network connectivity is disrupted, via the Offline Circulation utility (see **Downloading the Offline Circulation Utility**). When connectivity is restored, the Offline Circulation List page enables you to upload a data file to Alma that contains the offline loan and return transactions.

NOTE:

The Offline Circulation List page is available only when you are logged in to a circulation desk.

Name	Date modified	Type	Size
Offline Circulation	10/9/2012 4:25 PM	Shortcut	1 KB
UnInstall	10/9/2012 4:25 PM	Shortcut	1 KB

Figure 183: Offline Circulation List Page

To upload offline loans and returns:

1 On the Offline Circulation List page (**Fulfillment** > **Advanced Tools** > **Offline Circulation**), click in the **File name** field and select the .dat file containing the list of loans and returns performed during connection downtime. The default location of the file (configured during the Offline Circulation utility installation) is: `<Local Drive>\Alma Offline Circulation\OffCirc\files\OffCirc.dat`

The file name is displayed in the **File name** field.

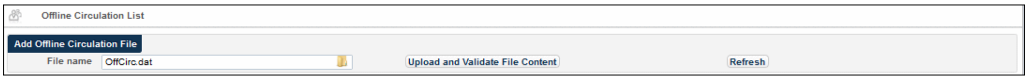
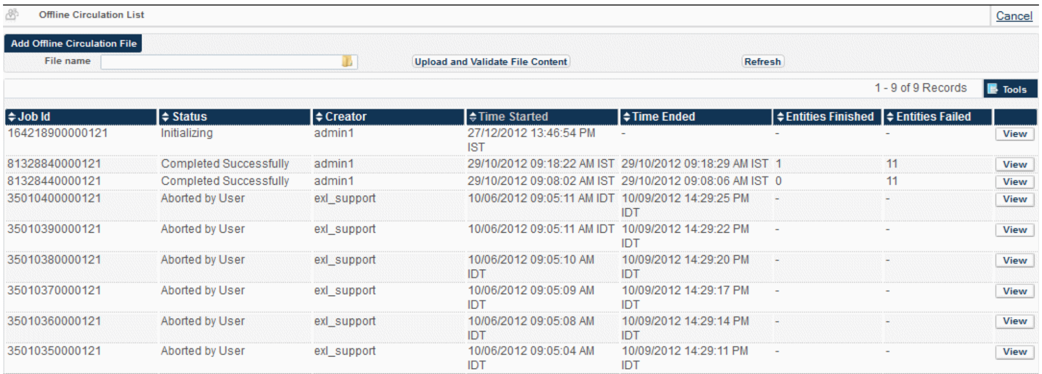


Figure 184: Offline Circulation List Page

2 Click **Upload and Validate File Content**. The job is displayed in the table at the bottom of the page. Its status is displayed in the **Status** column.



Job Id	Status	Creator	Time Started	Time Ended	Entities Finished	Entities Failed	
164218900000121	Initializing	admin1	27/12/2012 13:46:54 PM IST	-	-	-	View
81328840000121	Completed Successfully	admin1	29/10/2012 09:18:22 AM IST	29/10/2012 09:18:29 AM IST	1	11	View
81328440000121	Completed Successfully	admin1	29/10/2012 09:08:02 AM IST	29/10/2012 09:08:06 AM IST	0	11	View
35010400000121	Aborted by User	exl_support	10/06/2012 09:05:11 AM IDT	10/09/2012 14:29:25 PM IDT	-	-	View
35010390000121	Aborted by User	exl_support	10/06/2012 09:05:11 AM IDT	10/09/2012 14:29:22 PM IDT	-	-	View
35010380000121	Aborted by User	exl_support	10/06/2012 09:05:10 AM IDT	10/09/2012 14:29:20 PM IDT	-	-	View
35010370000121	Aborted by User	exl_support	10/06/2012 09:05:09 AM IDT	10/09/2012 14:29:17 PM IDT	-	-	View
35010360000121	Aborted by User	exl_support	10/06/2012 09:05:08 AM IDT	10/09/2012 14:29:14 PM IDT	-	-	View
35010350000121	Aborted by User	exl_support	10/06/2012 09:05:04 AM IDT	10/09/2012 14:29:11 PM IDT	-	-	View

Figure 185: Offline Circulation List Page with Jobs

To view details of a job, click **View** for the relevant job. The Job Report page opens, detailing the number of items processed successfully and unsuccessfully.

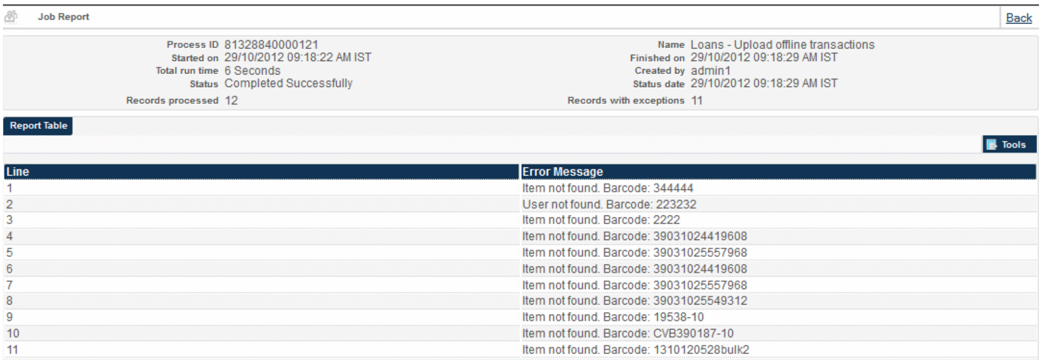


Figure 186: Job Report Page – Offline Circulation Job

Downloading the Offline Circulation Utility

PERMISSIONS:

To download the offline circulation utility, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

The offline circulation utility allows you to perform loans and returns offline in the event that your internet connection is down. When your connection is restored, you can upload a data file to Alma that contains these loan and return transactions.

The offline circulation utility can be downloaded from https://developers.exlibrisgroup.com/resources/alma/setup_offcirc.exe. Install the offline circulation utility using the Alma Offline Circulation Utility wizard. By default, the utility is installed in the `C:\Alma Offline Circulation` directory.

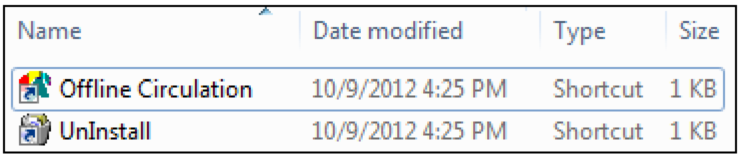


Figure 187: Offline Circulation

After you have downloaded the Offline Circulation application, you can perform loans and returns offline.

To perform loans and returns offline:

1. Click the **Offline Circulation** file in the `C:\Alma Offline Circulation` directory to run the utility. The following dialog box opens.

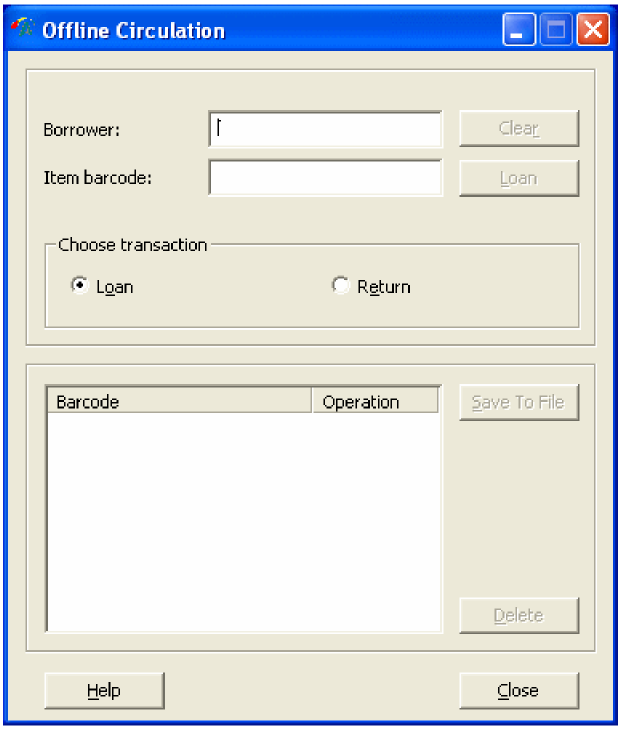


Figure 188: Offline Circulation Interface

2. Scan the borrower's library card to populate the **Borrower** and **Item barcode** fields.
3. Under **Choose transaction**, select **Loan** or **Return**.
4. Click the **Loan** or **Return** button to complete the transaction.
5. When all the transactions are completed, click **Save to File** to create a data file of all the transactions. The data file is saved to the `C:\Alma Offline Circulation\OffCirc` directory.

When your internet connection is restored, an administrator with the appropriate privileges can upload the data files to Alma from the Offline Circulation List page (**Fulfillment > Advanced Tools > Offline Circulation**). After the data files have been uploaded to Alma, you can delete them from the `C:\Alma Offline Circulation\OffCirc` directory.

NOTE:

It is important to delete data files after they have been uploaded to Alma. If you do not, the data files remain on the Offline Circulation Page and are processed into Alma again during the next upload.

Items Requiring Action

PERMISSIONS:

To run the Items Requiring Action job, you must have one of the following roles:

- Requests Operator
- Fulfillment Services Operator

You configure criteria for items requiring action on the Items Requiring Action page. Files are created according to the criteria you define and are uploaded to an FTP site using the connection type you specify. From this location, you upload the files into a scanning device. The device is passed over resources and notifies you when a resource matches the criteria in one of the files.

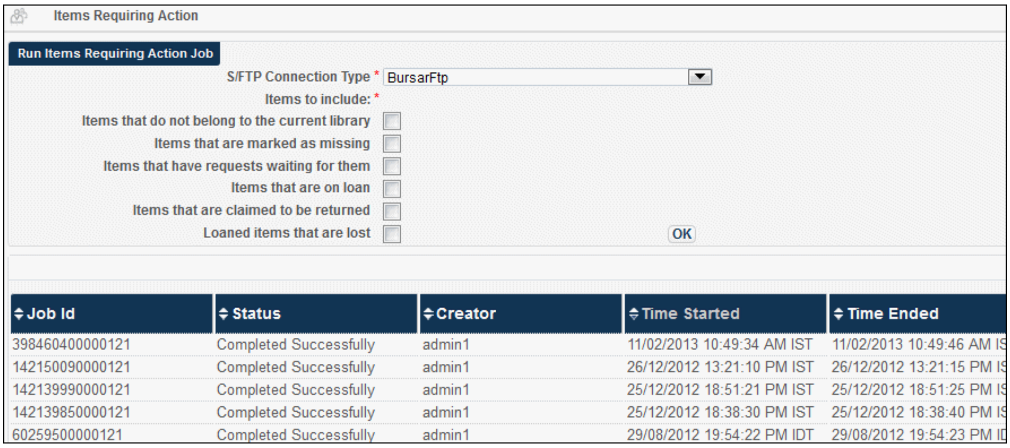


Figure 189: Items Requiring Action Page

VIDEO:

Learn about the **Items that are claimed to be returned** and **Loaned items that are lost** reports in the *New Reports in the Items Requiring Actions Job* video. (Note that must be logged in to the Documentation Center in order to view this video.)

To create a file of items requiring action:

1 On the Items Requiring Action page (**Fulfillment** > **Advanced Tools > Items Requiring Action**), select the criteria for the items you want included in the file:

- **S/FTP connection type** – Select a connection type, from a list predefined by an administrator (see **Configuring S/FTP Definitions** in the *Alma Administration Guide*)
- **Items that do not belong to the current library** – When selecting this option, the **Library** field is displayed, enabling you to select a library. Items that do not belong to the selected library are included in the file.

  A separate file is created for each library to which the items belong, and the code of the library is included in the file name.
- **Items that are marked as missing**
- **Items that have requests waiting for them**
- **Items that are on loan**
- **Items that are claimed to be returned**
- **Loaned items that are lost**

A file is created for each check box selected.

2 Click **OK** to create a job for the files. The job is displayed in the table at the bottom of the page.

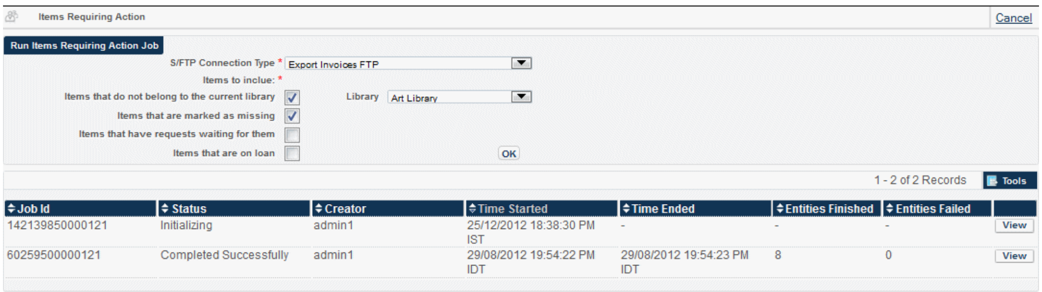


Figure 190: Items Requiring Action Page

To view details of a job, click **View** for the relevant job. The Job Report page opens, displaying details of the job, including the number of items processed successfully and unsuccessfully.

Figure 191: Job Report Page - Items Requiring Action

Transfer Requests

PERMISSIONS:

To run the Transfer Requests job, you must have one of the following roles:

- Fulfillment Services Operator
- Fulfillment Services Manager

You configure transfer requests on the Transfer Requests page. Transferring requests enables you to transfer requests assigned to a particular circulation desk to another circulation desk. All request process types can be transferred (pickup from shelf, hold shelf, and so forth).

To transfer requests from one circulation desk to another:

1. On the Transfer Requests page (**Fulfillment > Advanced Tools > Transfer Requests**), select a library in the **Library** field in which you want to transfer requests. The **From circulation desk** and **To circulation desk** fields are enabled for searching.

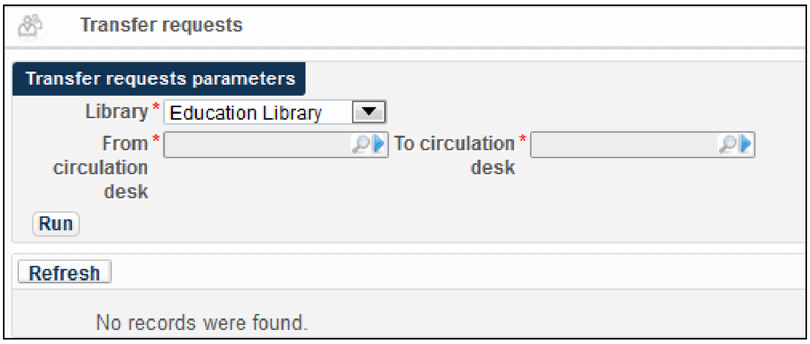


Figure 192: Transfer Requests Page

2. Select a circulation desk from which you want to move requests in the **From circulation desk** field.
3. Select a circulation desk to which you want to move requests in the **To circulation desk** field.
4. Click **Run**. The job is displayed in the table on the Transfer Requests page.

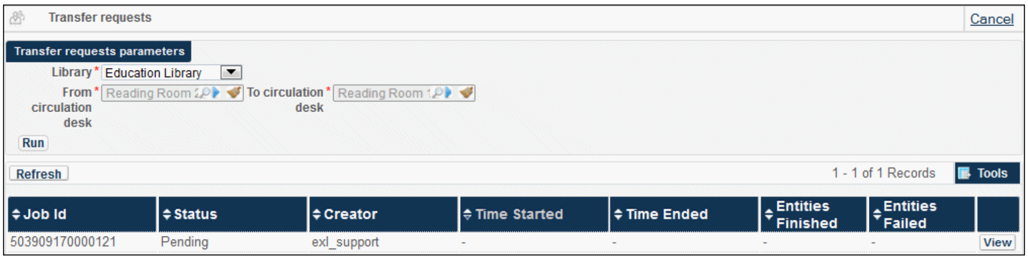


Figure 193: Transfer Requests Page

5 Click **Refresh** to update the job status. When completed, the number of entities that transferred successfully and unsuccessfully are displayed in the **Entities Finished** and **Entities Failed** columns, respectively.

NOTE:

The **From circulation desk** and **To circulation desk** must have identical configuration for requests to be transferred successfully. For example, **On Hold Shelf** requests cannot be moved to a desk that is not configured to have a hold shelf. For details on configuring circulation desks, see **Configuring Circulation Desks** on page **249**.

Creating Fines and Fees Reports

PERMISSIONS:

To create a Fines and Fees Report, you must have one of the following roles:

- Fulfillment Administrator
- Circulation Desk Manager
- General System Administrator

The Fines and Fees Report is a downloadable Excel file that includes a report of the fines and fees transactions that have been performed over a 1- to 7-day period. This report allows you to specify the following filters:

- Received by library – Filters by the library at which the fine/fees were paid. This filter cannot be used for reporting waive actions.
- Received by circulation desk – If a library is specified, filters by the circulation desk at which the fine/fees were paid. This filter cannot be used for reporting waive actions.
- Transaction types – Filters by the type of transaction:
  - **Payment and Waive** – includes both payments and waivers

- **Payment** – includes only payments
- **Waive** – includes only waivers

- Fine owner – filters by the owner of the fine/fee, which may or may not be the same location where the fine or fee was paid or waived

Reports can be sent to a specific user or printer.

To create a Fines and Fees Report:

1 On the **Fulfillment > Advanced Tools** menu, click **Create Fines and Fees Report**.

The Fines and Fees Report page opens.

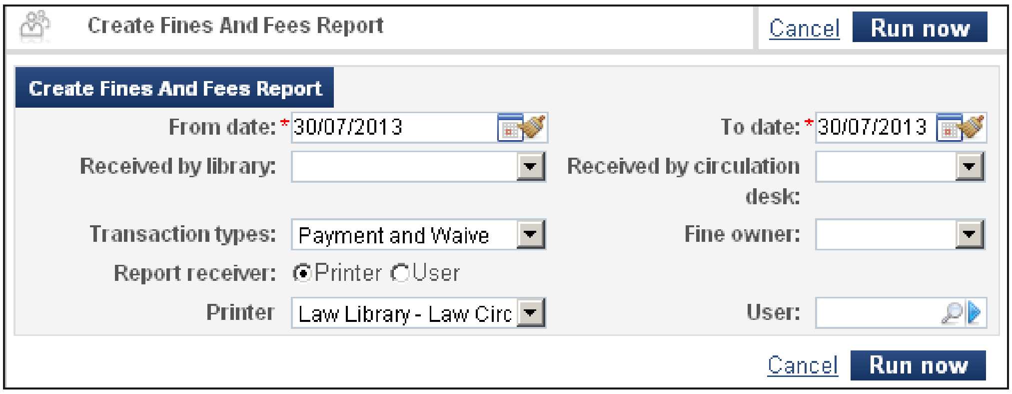


Figure 194: The Create Fines and Fees Report Page

2 Enter the following information to set up the report:

- **From date** – Specify the start date of the report. By default, it is set to the current date.
- **To date** – Specify the end date of the report. By default, it is set to the current date.

NOTE:
If you specify more than a 7-day period, an error message appears.

3 Specify any of the filters listed above and the destination of the report (**Printer** or **User**).

4 Click **Run Now**.

The report is sent to the specified report receiver.

A1 | Fine Date

	A	B	C	D	E	F	G	H	I	J	K	L
1	Fine Date	Patron Identifier	Patron Name	Charge Amount	Charge Type	Owning Library	Date Paid	Received E	Descriptior	Amount Pa	Amount W	Payment Type
2	2013-07-21 13:52	admin1	User, Super	0 USD	Credit		2013-07-24	Main Libra		-980.25 US		Payment
3	2013-07-22 15:39	admin1	User, Super	0 USD	Lost item process fee	Main Library	2013-07-24	Main Libra	Unguarded	50 USD		Payment
4	2013-07-22 15:39	admin1	User, Super	0 USD	Lost item replacement fee	Main Library	2013-07-24	Main Libra	Unguarded	50 USD		Payment
5	2013-07-22 15:39	admin1	User, Super	0 USD	Overdue fine	Main Library	2013-07-24	Main Libra	Unguarded	400 USD		Payment
6	2013-07-22 15:39	admin1	User, Super	0 USD	Lost item process fee	Main Library	2013-07-24	Main Libra	Unguarded	50 USD		Payment
7	2013-07-22 15:39	admin1	User, Super	0 USD	Lost item replacement fee	Main Library	2013-07-24	Main Libra	Unguarded	50 USD		Payment
8	2013-07-22 15:39	admin1	User, Super	0 USD	Overdue fine	Main Library	2013-07-24	Main Libra	Unguarded	400 USD		Payment
9	2013-07-22 14:26	admin1	User, Super	0 USD	Overdue fine	Main Library	2013-07-24	Main Libra	Asian book	400 USD		Payment
10	2013-07-22 10:33	admin1	User, Super	0 USD	Card renewal		2013-07-24	Main Libra		1010.25 US		Payment
11	2013-04-07 15:03	noga	Erez, Noga	0 USD	Credit	Main Library	2013-07-24	Main Libra	Peace: ho	-37.5 USD		Payment
12	2013-04-07 15:00	noga	Erez, Noga	0 USD	Lost item replacement fee	Main Library	2013-07-24	Main Libra	Peace: ho	40 USD		Payment
13	2013-04-07 15:00	noga	Erez, Noga	0 USD	Overdue fine	Main Library	2013-07-24	Main Libra	Peace: ho	137 USD		Payment
14	2013-04-07 15:03	noga	Erez, Noga	0 USD	Lost item process fee	Main Library	2013-07-24	Main Libra	Peace: ho	50 USD		Payment
15	2013-04-07 15:03	noga	Erez, Noga	0 USD	Lost item replacement fee	Main Library	2013-07-24	Main Libra	Peace: ho	50 USD		Payment
16	2013-04-07 15:03	noga	Erez, Noga	0 USD	Overdue fine	Main Library	2013-07-24	Main Libra	Peace: ho	137 USD		Payment
17	2013-04-08 15:15	noga	Erez, Noga	0 USD	Credit	Main Library	2013-07-24	Main Libra	Peace: ho	-37.5 USD		Payment
18	2013-04-08 15:40	noga	Erez, Noga	0 USD	Overdue fine	Main Library	2013-07-24	Main Libra	booking se	10 USD		Payment
19	2013-04-17 08:33	noga	Erez, Noga	0 USD	Overdue fine	Main Library	2013-07-24	Main Libra	Peace: ho	30 USD		Payment
20	2013-03-07 07:11	noga	Erez, Noga	0 USD	Lost item process fee	Biochemistry	2013-07-24	Main Libra	book to los	50 USD		Payment
21	2013-03-07 07:11	noga	Erez, Noga	0 USD	Lost item replacement fee	Biochemistry	2013-07-24	Main Libra	book to los	50 USD		Payment
22	2013-07-17 13:38	noga	Erez, Noga	0 USD	Overdue fine	Biochemistry	2013-07-24	Main Libra	Booking2	61 USD		Payment
23	2013-07-17 13:38	noga	Erez, Noga	0 USD	Overdue fine	Biochemistry	2013-07-24	Main Libra	Booking2	2 USD		Payment
24	2012-08-28 11:18	noga	Erez, Noga	0 USD	Credit	Main Library	2013-07-24	Main Libra	Diplomatic	-37.5 USD		Payment
25	2013-04-07 14:59	noga	Erez, Noga	0 USD	Credit	Main Library	2013-07-24	Main Libra	Peace: ho	-37.5 USD		Payment
26	2013-04-07 14:56	noga	Erez, Noga	0 USD	Lost item process fee	Main Library	2013-07-24	Main Libra	Peace: ho	50 USD		Payment
27	2013-04-07 14:56	noga	Erez, Noga	0 USD	Lost item replacement fee	Main Library	2013-07-24	Main Libra	Peace: ho	50 USD		Payment
28	2013-04-07 14:56	noga	Erez, Noga	0 USD	Overdue fine	Main Library	2013-07-24	Main Libra	Peace: ho	137 USD		Payment
29	2013-04-07 15:00	noga	Erez, Noga	0 USD	Lost item process fee	Main Library	2013-07-24	Main Libra	Peace: ho	50 USD		Payment
30	2013-04-07 15:00	noga	Erez, Noga	0 USD	Lost item replacement fee	Main Library	2013-07-24	Main Libra	Peace: ho	10 USD		Payment

Figure 195: Sample Fines and Fees Report

8

Configuring Fulfillment

This section includes:

Configuring Fulfillment Activities – Overview

Fulfillment represents the culmination of many of the library's processes and patron-facing activities, such as organizational infrastructure, acquisitions, and user management. 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

This section describes how to configure the various fulfillment functions. See **Alma Glossary** for definitions of these functions.

NOTE:

During implementation, only some of the configuration options on this page can be configured by the Fulfillment Administrator. The rest of the configuration options on this page can be performed only by Ex Libris Professional Services staff. Once your Alma system is "live" and your institution's administrators have received Alma certification, the entire page will be open to administrators.

Fulfillment activities are configured in Alma according to location. You configure the various fulfillment activities from the Fulfillment Configuration page, which you access by selecting **Fulfillment Configuration > Configuration Menu** from the **Fulfillment** menu.

On the Fulfillment Configuration page, the following is displayed:

- a filter option, enabling you to display the configuration options for the institution or libraries within the institution
- a list of the available configuration items

VIDEO:

For an introduction to Fulfillment configuration, see the *Fulfillment Fundamentals* video (28 mins). Note that you need to download an ARF player to view this video.

The following table lists the configuration options available at the institution level.

Table 22. Configuration Options – Institution

Section	Configuration Item	See
Library	Opening Hours	**Configuring Libraries** on page **237**
	Relationships	**Configuring Fulfillment Relationships** on page **241**
	Transit Time	**Configuring Transit Time Rules** on page **245**
	SIP2 Bin Configuration	**Configuring SIP2 Bin Configuration** on page **261**
Physical Locations	Remote Storage	**Configuring Remote Storage Facilities** on page **268**

Table 22. Configuration Options – Institution

Section	Configuration Item	See
Physical Fulfillment	Fulfillment Units	**Configuring Fulfillment Units, Policies and Item Policies, and Terms of Use** on page **273**
	Terms of Use	**Configuring Terms of Use** on page **293**
	Policies	**Configuring Policies** on page **282**
	Item Policies	**Configuring Item Policies** on page **291**
	Block Preferences	**Configuring Block Preferences** on page **303**
	Auto Loan Renewal Rules	**Configuring Automatic Loan Renewal Rules** on page **306**
	Advanced Policy Configuration	**Configuring Policies** on page **282**
	Overdue and Lost Loan Profiles	**Configuring Overdue and Lost Loan Profiles** on page **311**
	Loan Recalls Configuration	**Configuring Loan Recall Requests** on page **316**
	Request Task Name	**Configuring Request Task Names** on page **318**
Patron Configurations	Patron Groups	**Configuring Patron (User) Groups** on page **319**
	Patron Limits	**Configuring Patron Limits** on page **319**
	Loan Limits	**Configuring Loan Limit Rules** on page **322**
	User Block Definitions	**Configuring User Block Definitions** on page **326**
	User Demerits	**Configuring Demerit Points** on page **331**

Table 22. Configuration Options – Institution

Section	Configuration Item	See
Digital Fulfillment	Digitization Departments	**Configuring Digitization Departments** on page 335
	Digitization Profile Rules	**Configuring Digitization Profile Rules** on page 340
	Access Rights	**Configuring Access Rights** on page 344
	Electronic Document Delivery Rules	**Configuring Electronic Document Delivery Rules** on page 349
Courses	Processing Departments	**Configuring Processing Departments** on page 353
	Academic Departments	**Configuring Academic Departments** on page 354
	Additional Reading List Citation Statuses	**Configuring Additional Reading List Citation Statuses** on page 357
	Course Terms	**Configuring Course Terms** on page 359
Resource Sharing	Workflow Profiles	**Configuring Workflow Profiles** on page 361
	Copyrights	**Configuring Copyrights** on page 365
	Rota Assignment Rules	**Configuring Rota Assignment Rules** on page 366
	Locate Profiles	**Configuring Locate Profiles** on page 369
	Shipping Cost Lender Rules	**Configuring Shipping Cost Lender Rules** on page 373
	Shipping Cost Borrower Rules	**Configuring Shipping Cost Borrower Rules** on page 374
	Sending Borrowing Request Rules	**Configuring Sending Borrowing Request Rules** on page 375

Table 22. Configuration Options – Institution

Section	Configuration Item	See
Discovery Interface Display Logic	Display Logic Rules	**Configuring Display Logic Rules** on page 380
	Labels	**Configuring Labels** on page 387
	Related Records	**Configuring Services for Related Records** on page 388
	Direct Linking	**Configuring Direct Linking** on page 393
	General Electronic Services	**Configuring General Electronic Services** on page 395
	Online Services Order	**Configuring Online Services Order** on page 395
	General Electronic Services Order	**Configuring General Electronic Services Order** on page 398
	Locations Ordering Profile	**Configuring Locations Ordering Profiles** on page 400
General	Fulfillment Jobs Configuration	**Configuring Fulfillment Jobs** on page 402
	Other Settings	**Configuring Other Settings** on page 406
	Printers	**Configuring Printers** on page 410
	Article Form Mandatory Fields	**Configuring Article and Book Form Mandatory Fields** on page 414
	Book Form Mandatory Fields	**Configuring Article and Book Form Mandatory Fields** on page 414

The following table lists the configuration options available at the library level.

Table 23. Configuration Options – Library

Section	Configuration Item	See
Library	Opening Hours	**Configuring Libraries** on page **237**
	Relationships	**Configuring Fulfillment Relationships** on page **241**
	Circulation Desks	**Configuring Circulation Desks** on page **249**
	Temporary Item Creation Rules	**Configuring Temporary Item Creation Rules** on page **260**
Physical Locations		**Configuring Physical Locations** on page **265**
Physical Fulfillment	Fulfillment Units	**Configuring Fulfillment Units, Policies and Item Policies, and Terms of Use** on page **273**
	Terms of Use and Policies	**Configuring Terms of Use** on page **293**
	Item Policy	**Configuring Item Policies** on page **291**
	Advanced Policy Configuration	**Configuring Policies** on page **282**
	Overdue and Lost Loan Profiles	**Configuring Overdue and Lost Loan Profiles** on page **311**
Digital Fulfillment	Digitization Departments	**Configuring Digitization Departments** on page **335**
Courses	Processing Departments	**Configuring Processing Departments** on page **353**
	Academic Departments	**Configuring Academic Departments** on page **354**
	Additional Reading List Citation Statuses	**Configuring Additional Reading List Citation Statuses** on page **357**
Resource Sharing	Workflow Profiles	**Configuring Workflow Profiles** on page **361**
	Copyrights	**Configuring Copyrights** on page **365**

Table 23. Configuration Options – Library

Section	Configuration Item	See
Discovery Interface Display Logic	Display Logic Rules	**Configuring Display Logic Rules** on page **380**
	Labels	**Configuring Labels** on page **387**
General	Printers	**Configuring Printers** on page **410**

Library

Configuring Libraries

PERMISSIONS:

To configure libraries, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Each Alma installation is composed of a single institution that includes one or more libraries. You can configure the details of the institution and the libraries. This section describes how to configure the library details. For information on how to configure the institution details, see **Editing the Institution's Details** in the *Alma Administration Guide*.

The library details that you can configure include:

- General information
- Contact information
- Calendar details

You configure the library details on the Organization Unit Details page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Library > Opening Hours**, click the **Summary** tab).

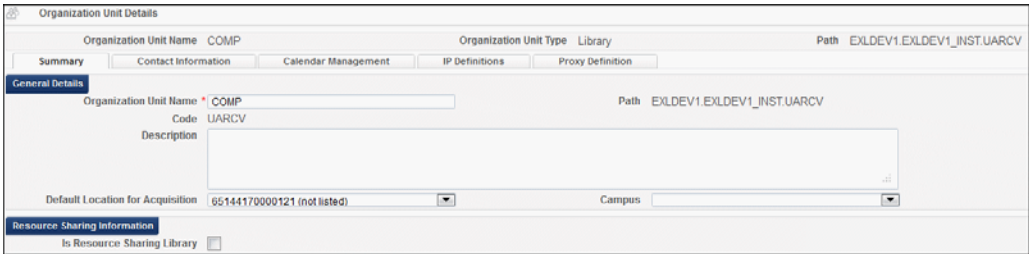


Figure 196: Organization Unit Details Page – Summary Tab

NOTE:

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

The Organization Unit Details page contains the following tabs:

- **Summary** – Enables you to display and edit the general details of the library.

  You can configure resource sharing library information on the Summary tab. For details, see **To configure resource sharing library information:**, below.

- **Contact Information** – Enables you to display and edit the contact information for the library, including physical addresses, phone numbers, and email addresses.
- **Calendar Management** – Enables you to configure the hours during which the library is open or closed. Configuration of open and closed hours has ramifications for fulfillment services such as loans and requests. The operating hours that you define at the institution level are applicable to the libraries within the institutions, unless separate records are defined at the library level. You can also define fixed dates in the calendar, such as End of Term, End of Summer, End of Year, and so forth.

IMPORTANT:

When modifying a library's hours, you must click **Apply Changes** on the Calendar Management page for the changes to be applied.

- **IP Definitions** – Enables you to add or modify IP definitions that indicate the machines from which access to the library is permitted.

For details on managing the fields on each of these tabs, see **Managing Institutions and Libraries** in the *Alma Administration Guide*.

To configure resource sharing library information:

1. On the Summary tab, modify the **Organization Unit Name** and **Description** fields, as necessary.
2. Select **Is Resource Sharing Library**. The Resource Sharing Information section fields display.

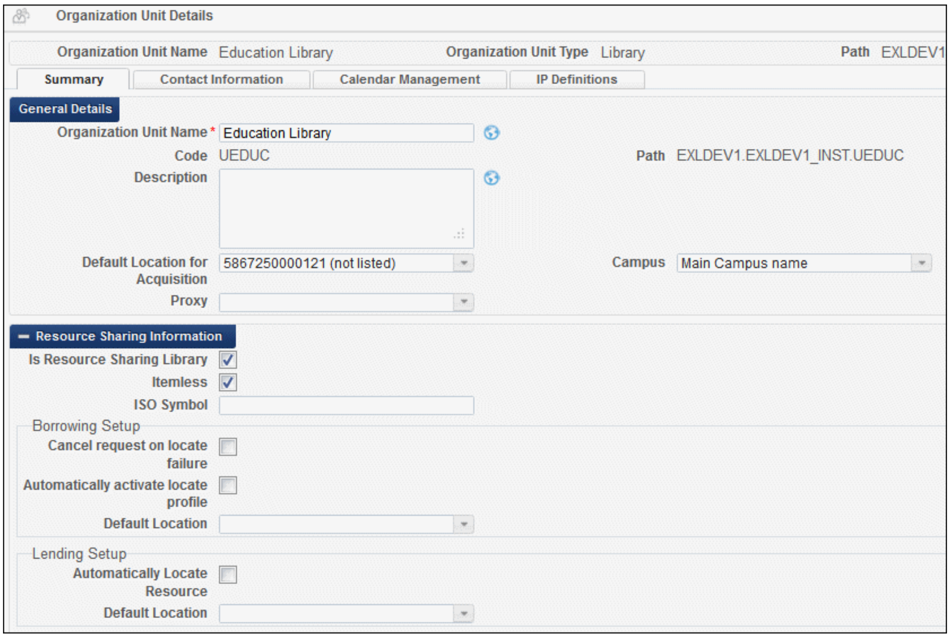


Figure 197: Organization Unit Details Page – Resource Sharing Information Fields

3. Select **Itemless** to designate the library as an itemless resource sharing library (see **Configuring an Itemless Resource Sharing Library** on page **240**).
4. Enter the ISO symbol of your resource sharing library in the **ISO symbol** field to indicate that the library works with ISO.
5. Select **Cancel request on locate failure** to cancel the resource sharing request if the resource is not located (or if more than one resource is located). In such a case, the request's status is **Canceled**. If this option is not selected, **Request Status = Lending Request** and **Locate Status = Resource Not Located**.
6. Select **Automatically activate locate profile** to indicate that when a rota assignment rule is met, a locate profile is assigned to the activated rota, based on the rota assignment rule. For details on rota assignment rules, see **Configuring Rota Assignment Rules** on page **366**.
7. Select **Automatically locate resource** for Alma to attempt to locate the requested resource locally.

8 In the **Default location** field, select the default location in which to search for the requested resource in the library you are configuring.

9 Click **Save**.

Configuring an Itemless Resource Sharing Library

PERMISSIONS:

To create an itemless resource sharing library, you must have one of the following roles:

- General System Administrator
- System Administrator

To use an itemless resource sharing library, you must have one of the following roles:

- Fulfillment Services Operator (for the resource sharing library)
- Fulfillment Services Manager (for the resource sharing library)

An itemless resource sharing library does not handle items. This library serves as a broker for other resource sharing libraries, transferring requests from a lending library to a receiving library, without an actual inventory of items.

A resource sharing process that is managed by an itemless resource sharing library has the following special attributes:

- Items received as part of a resource sharing request process are not cataloged as temporary items.
- Shipping lending requests is possible without attaching a real inventory item to the shipped request.

All other aspects of the resource sharing process, such as the exchange of messages between the borrowing library and the lending library, are identical to the process that is managed by regular resource sharing libraries.

To designate a resource sharing library as itemless, select the **Itemless** check box on the Organization Unit Details page (see step **3** in **To configure resource sharing library information:** on page **239**).

To use an itemless library as a broker for resource sharing requests:

1 Create a resource sharing borrowing request (**Fulfillment > Resource Sharing > Borrowing Requests**, select **Add > From Search** or

Add > Manually). Ensure that you select **Pickup at = Resource Sharing Library** and that you assign partner to the request.

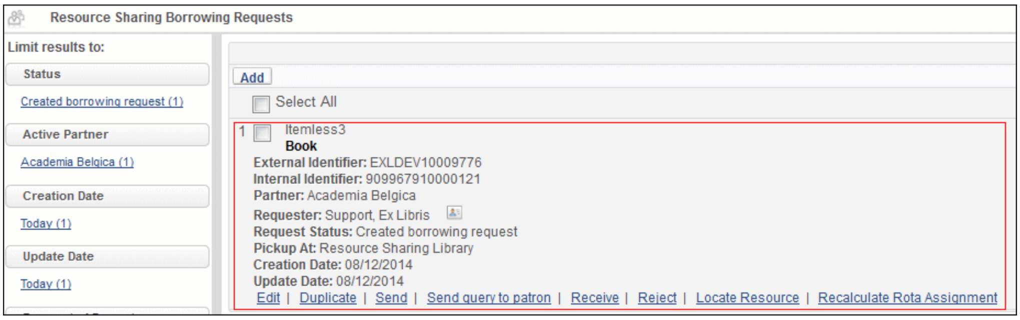


Figure 198: Resource Sharing Borrowing Requests Page

2 Click **Send**. The **Request Status = Request sent to partner**.

3 To receive the requested resource, click **Receive** for the request. The Received Items page opens.

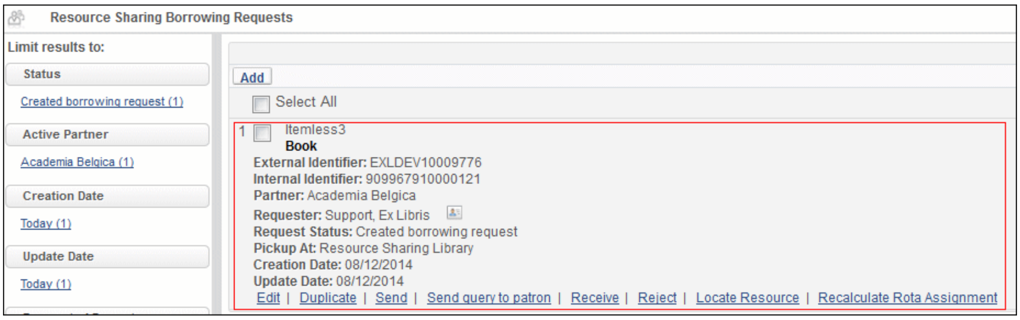


Figure 199: Received Items Page

4 In the **Internal Note** field, enter a note to indicate information that describes the purpose for which the resource is requested. The request's status changes to **Physically Received by Library**.

When shipping an itemless lending request, ensure that the Scan Item Barcode field is blank on the Shipping Items page (see **Shipping Items** on page 180).

Configuring Fulfillment Relationships

PERMISSIONS:

To configure fulfillment relationships, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

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 in the institution.

You configure fulfillment relationships on the Organizational Units Relationships Setup page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Library > Relationships**).

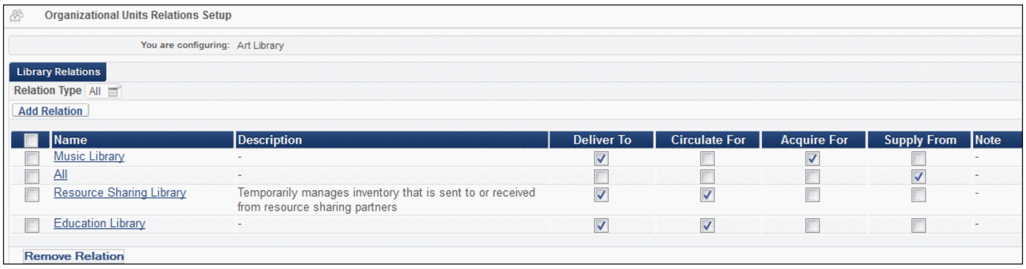


Figure 200: Organizational Units Relationships Setup Page

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

The Organizational Units Relationships Setup page displays the following:

- A filter option (in the **Relation type** drop-down list), enabling you to display all organization unit relationships, or organization unit relationships of specified types only
- A **Find** option which enables you to search organization unit relationships by either of the **in** drop-down options — **Description** or **Name**
- The **Organization Unit List** link, which enables you to view a list of the organization units

The following actions can be performed on this page:

- Adding Organizational Unit Relationships (see **Adding Organizational Unit Relationships**, below)
- Editing Organizational Unit Relationships (see **Editing Organizational Unit Relationships** on page **244**)
- Deleting Organizational Unit Relationships (**Actions** > **Delete**)

Adding Organizational Unit Relationships

You can add organizational unit relationships.

To add organizational unit relationships:

1 On the Organizational Units Relationships Setup page, click the **Add Relation** button. The Add Library Relationship dialog box opens.

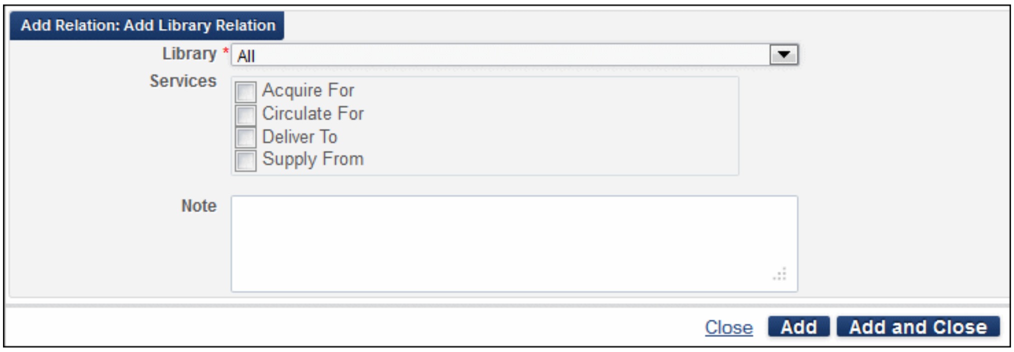


Figure 201: Add Library Relationship Dialog Box

2 From the **Library** drop-down list, select which library or libraries will receive services from the library that you are configuring.

3 Select the services that the library you are configuring can provide to the library selected above:

- **Acquire for** – The library that you are configuring is able to acquire items for the specified library.

- **Circulate for** (available on the library level only) – The library that you are configuring is able to check in and check out items for the specified library.
- **Deliver to** (available on the library level only) – The library that you are configuring is able to deliver requested items to the specified library.
- **Supply from** (available on the library level only) – The library that you are configuring is able to supply items to the resource sharing library. The libraries for which you configure a **Supply from** relationship display in the **Availability** information for lending requests on the Resource Sharing Lending Requests Task List page (see **Managing Resource Sharing Lending Requests** on page **154**), and on the Manage Resource Options page when managing fulfillment options for a request (see **Managing Fulfillment Options** on page **168**).

For details on configuring a library to perform services for a another library in an institution, see **Configuring Fulfillment Relationships** on page **241**.

VIDEO:

Learn about how to link resource sharing libraries with regular libraries in the add interested users to a PO line in the *Linking Resource Sharing Libraries with Regular Libraries* video (5:21 mins). Note that you need to be logged in to the Documentation Center in order to view this video.

4 Click **Add and Close** to close the dialog box. The relationship you defined is listed under **Library Relationships** on the Organizational Units Relationships Setup page.

Editing Organizational Unit Relationships

You can edit organizational unit relationships.

To edit an organizational unit relationships:

1 On the Organizational Units Relationships Setup page, click the **Actions > Edit** for an entry. The Edit Relation page displays.

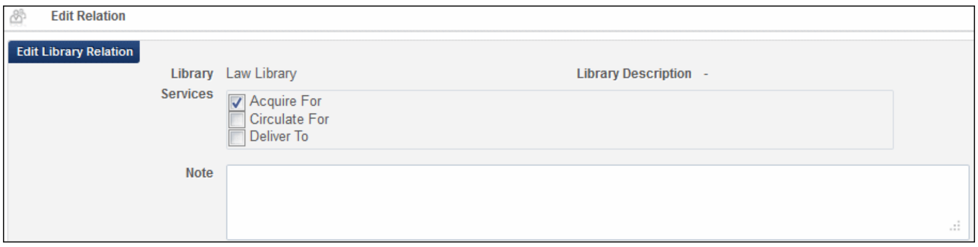


Figure 202: Edit Relation Page

2 Modify the relevant fields, as described in step **3**, above.

3 Click **Save**.

Configuring Transit Time Rules

PERMISSIONS:

To configure transit time rules, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Transit time rules enable calculating the feasibility and expected delivery times for fulfillment requests. When an item request is received, the fulfillment transit time rules are checked to determine the expected transit time based on the location of the item requested, the pickup location and, in some cases, the material type of the item (for example, moving an oversized item from one library to another may take longer than moving an average-sized item).

There is a default transit time rule that defines the delivery time when none of the transit time rules is met. This default rule can be modified, but out-of-the-box it is set to a 12-hour delivery time. When you define a new transit time rule, you can test the rule by calculating the estimated time of arrival (ETA) for a scenario in which the rule is applied. For details, see **To calculate the estimated time of arrival for a resource:** on page 249.

Each transit time rule can be either enabled or disabled. By default, each new rule is enabled.

You configure transit time rules from the Transit Time Rules page **(Fulfillment Configuration > Configuration Menu > Library > Transit Time)**.

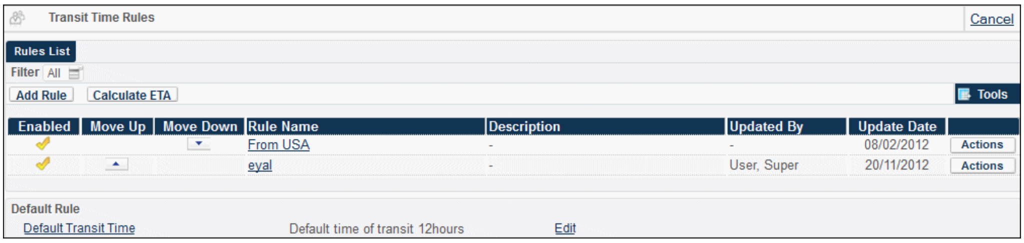


Figure 203: Transit Time Rules Page

NOTE:

Transit time rules can be configured at the institution level only. Select the required institution from the **You are configuring** filter on the Fulfillment Configuration page.

The Transit Time Rules page displays the following:

- A filter option, enabling you to display all transit time rules, or only active or inactive rules. Click the **Filter** drop-down list and select whether to display all transit time rules, or active or inactive rules only.
- A list of the transit time rules
- The default transit time rule

The following actions can be performed on this page:

- Adding a Transit Time Rule (see **Adding a Transit Time Rule**, below)
- Editing a Transit Time Rule (**Actions > Edit**)
- Deleting a Transit Time Rule (**Actions > Delete**)
- Editing the Default Transit Time Rule (see **Editing the Default Transit Time Rule**, below)
- Calculating the ETA for a Resource (see **Calculating the Estimated Time of Arrival For a Resource**, below)

Adding a Transit Time Rule

You can add a new transit time rule, which can be either enabled or disabled. By default, each new rule is enabled.

The delivery time that is determined during a particular request can have an effect on how and when the service is provided to the requesting patron. In some cases, the patron may not be interested in the service after a particular time or date. In such a case, longer delivery times can eliminate certain fulfillment options altogether. In other cases, the calculated delivery time may give an estimated indication of when the item will arrive at the pickup location.

The material type of the physical item requested and the source (**From**) location of an item can also limit the fulfillment scenarios available for a given request, as they, too, may affect the feasibility and speed of the transfer.

To add a transit time rule:

1 On the Transit Time Rules page, click the **Add Rule** button. The Transit Time Rules Editor page opens.

NOTE:

If you want to create a copy of an existing transit time rule, select **Actions > Duplicate**. Once you have copied the rule, you can modify it as needed.

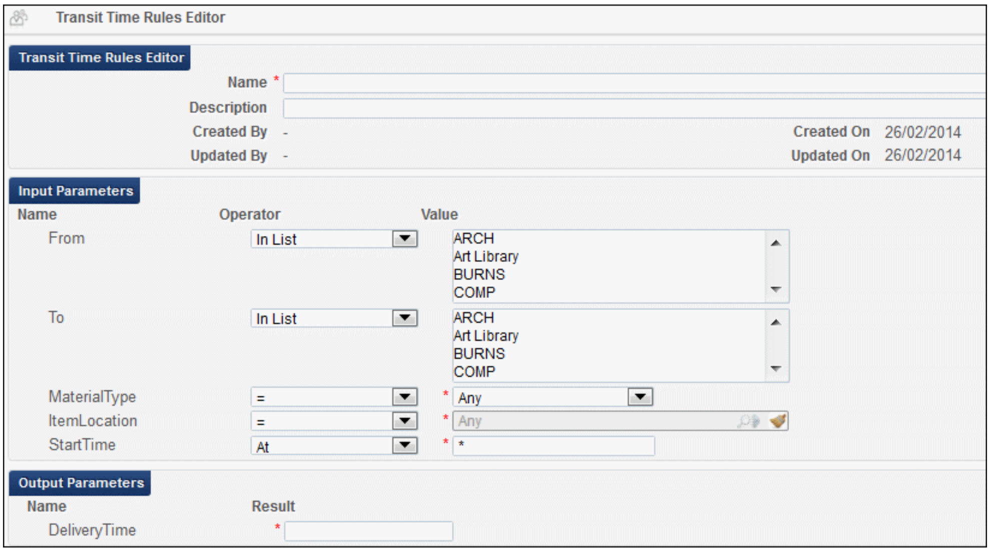


Figure 204: Transit Time Rules Editor Page

2 In the **Transit Times Rules Editor** section, specify a name (required) and description (optional) for the new rule.

3 In the **Input Parameters** section, specify an operator and enter values for the following parameters:

- **From** – The source organization unit—that is, the library or institution from which the item will be transferred.

  You can add several source organization units to be included in the rule by pressing **Ctrl** on your keyboard while selecting the relevant values.

- **To** – The destination—that is, the library to which the item will be delivered. The **To** drop-down list includes only those libraries that have a **Deliver to** relationship with the source location. For details on fulfillment relationships, see **Configuring Fulfillment Relationships** on page **241**.

  You can add several destinations to be included in the rule by pressing **Ctrl** on your keyboard while selecting the relevant values.

- **Material type** – Select the type of item that is to be delivered.

- **Item location** – Select the physical location inside the source location from which the item will be transferred.

- **Start time** – Enter the time of day at which items are dispatched from the source location to the specified destination.

4 In the **Output Parameters** section, enter the delivery time (in hours) that it will take to deliver the item when the specified input parameters are fulfilled.

5 Click **Save**. The rule you defined is listed at the bottom of the list of rules on the Transit Times Rules page.

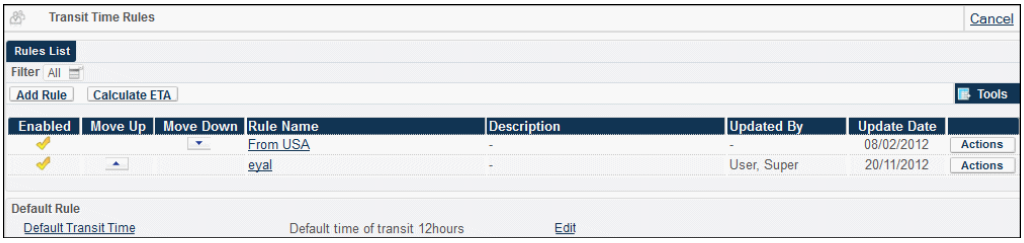


Figure 205: Transit Time Rules Page

6 Use the **Move Up** and **Move Down** arrows to set the order of the transit time rules. The order of the rules within the list of rules is significant because Alma applies the first (enabled) rule whose input parameters are satisfied.

NOTE:
You can click the gray/yellow check mark to the left of the rule to enable/ disable it.

Editing the Default Transit Time Rule

The default transit time rule defines the delivery time when none of the transit time rules is met. The default transit time rule is specified in hours.

To edit the default transit time rule:

1 On the Transit Time Rules page, under **Default Rule**, click **Edit.** The Transit Time Rules Editor page opens.

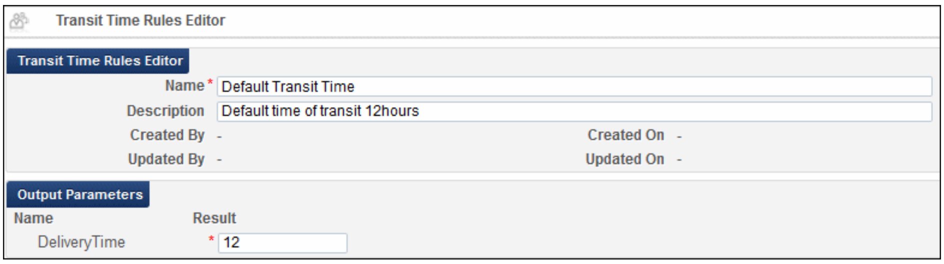


Figure 206: Transit Time Rules Editor Page

2 In the **Transit Time Rule Editor** section, modify the default rule name and description, if required.

3 In the **Output Parameters** section, enter the length, in hours, of the default delivery time.

4 Click **Save**. The modified default rule details are displayed on the Transit Time Rules page.

Calculating the Estimated Time of Arrival For a Resource

You can calculate the ETA of a resource that is to be transferred from one location to another. The ETA indicates in how many hours the resource will arrive at the destination location, and is based on the transit time rules that are defined for the source and destination locations. If none of the defined transit time rules is satisfied, the default transit time rule is applied. Calculating the ETA is useful in testing the rules that have been defined.

To calculate the estimated time of arrival for a resource:

1 On the Transit Time Rules page, click the **Calculate ETA** button. The Calculate ETA page opens.

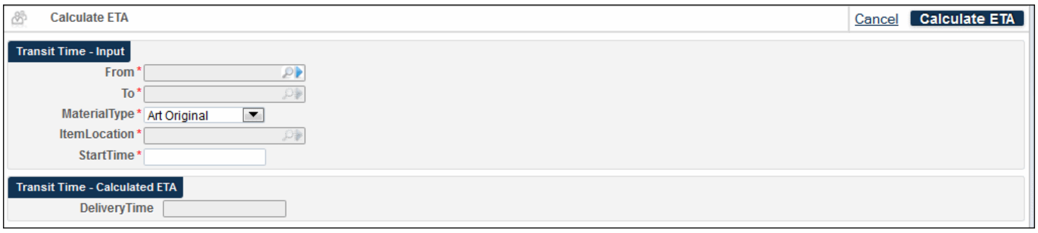


Figure 207: Calculate ETA Page

2 In the **Transit Time - Input** section, enter the input parameters for the calculation. See step 3, above for details on the input parameters.

3 Click **Calculate ETA**. The calculated ETA is displayed in the **Delivery time** field.

Configuring Circulation Desks

PERMISSIONS:

To configure circulation desks, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

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.

You configure circulation desks on the Circulation Desks page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Library > Circulation Desks**).

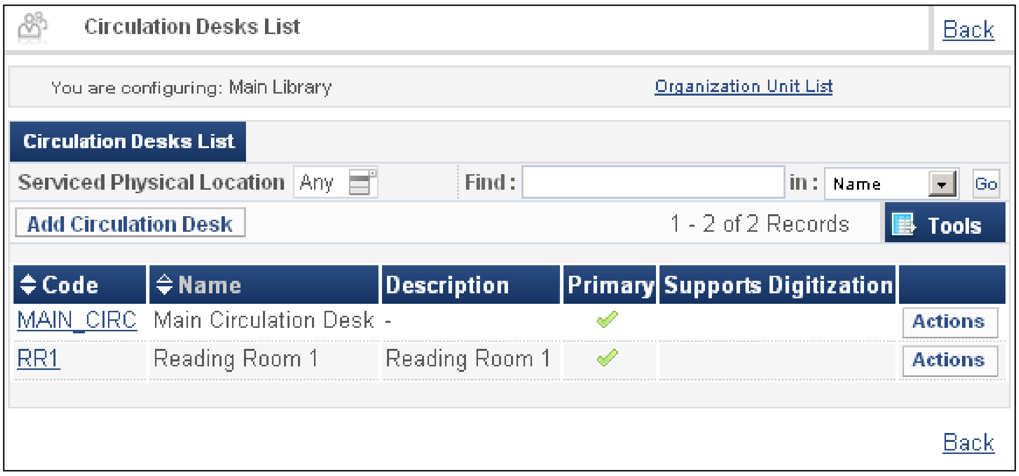


Figure 208: Circulation Desks List Page

NOTE:
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.

The Circulation Desks List page displays the following:

- A **Serviced physical location filter** option, enabling you to display all circulation desks, or only those circulation desks that serve a specified physical location
- A **Find** option, enabling you to search circulation desks by any of the **in** drop-down options—for example, by name, code, and so forth
- A list of circulation desks (for an explanation of the columns, see **Adding a Circulation Desk**, below)

You can click the circulation desk code or name headings to sort the list alphabetically—in ascending or descending order.

The following actions can be performed on this page:

- Adding a circulation desk (see **Adding a Circulation Desk**, below)
- Editing a circulation desk (see **Editing Circulation Desk Information** on page 259)
- Deleting a circulation desk (**Actions > Delete**)

Adding a Circulation Desk

You can add a circulation desk to a library.

To add a circulation desk:

1 On the Circulation Desk page, click the **Add Circulation Desk** button. The Circulation Desk – General Information page opens. This is the first page of a five-page wizard.

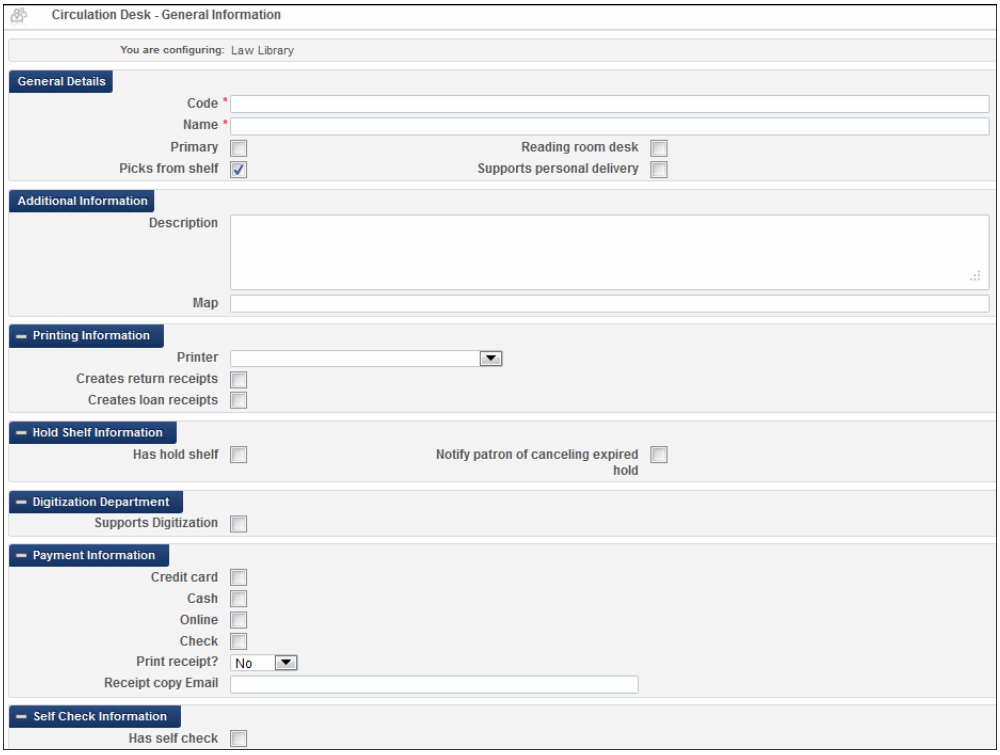


Figure 209: Circulation Desk – General Information Page

NOTE:
You can create a new circulation desk by creating a copy of an existing circulation desk. Select **Actions > Duplicate** and modify the new circulation desk as needed.

---

a Enter the circulation desk code and name (both required) for the new circulation desk.

b Enter information in the remaining optional fields, as described in the following table.

Table 24. Circulation Desk – General Information Fields

Field	Description
General Details:	
Primary	Select this check box if the circulation desk can perform check-out and check-in services for another library. For details, see **Configuring Fulfillment Relationships** on page **241**.

Reading room desk	Select this check box if the circulation desk serves a reading room.
	■ When a patron checks out a resource from a reading room, the patron is not permitted to remove the resource from the reading room.
	■ When a patron checks a resource in to a reading room, the patron must specify the check-in mode:
	  ■ **Final** – The patron no longer requires the resource, and the resource can therefore be returned to its permanent location.
	  ■ **Not final** – The patron still requires the resource. The resource should therefore be stored on the reading room's hold shelf.

Picks from shelf	Select this check box to indicate that the circulation desk can pick up items from the shelf. When this check box is cleared, the circulation desk cannot pick up items from the shelf. For example, you can clear this check box for an unmanned circulation desk that provides return bins for reshelving but does not handle pick-up-from-shelf requests.
Supports personal delivery	Select this check box to indicate that the circulation desk can process personal delivery requests for users. **NOTE:** If personal delivery is configured for a patron and the desk at which the **Receive** action is performed does not have this check box selected, Alma searches for another circulation desk in the library which supports personal delivery, and the item is sent there. If no such circulation desk exists, Alma searches for a library which supports personal delivery and has a **Deliver To** relationship with the receiving resource sharing library. If no such library exists, the item is moved to the hold shelf.

Table 24. Circulation Desk – General Information Fields

Field	Description
Additional Information:	
Description	A textual description of the circulation desk.
Map	The URL of a map to assist patrons in finding the location.
Printing Information:	
Printer	The printer that is associated with the circulation desk can be selected from the **Printer** list. The circulation desk prints all non-automated print jobs on this printer. Select a printer from the drop-down list.
Creates return receipts	Select for return receipts to automatically be printed at the circulation desk. For details on customizing the letter that accompanies the return receipt, see **Configuring Alma Letters** in the *Alma Administration Guide*.
Return receipt destination	Displayed only when **Creates return receipts** is selected. From the drop-down list, choose the destination for the return receipt: ■ **User preferred email** ■ **Circulation desk printer**
Creates loan receipts	Select for loan receipts to automatically be printed at the circulation desk. For details on customizing the letter that accompanies the loan receipt, see **Configuring Alma Letters** in the *Alma Administration Guide*.
Loan receipt destination	Displayed only when **Creates loan receipts** is selected. From the drop-down list, choose the destination for the loan receipt: ■ **User preferred email** ■ **Circulation desk printer**

Table 24. Circulation Desk – General Information Fields

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td colspan="2">Hold Shelf Information:</td></tr>
<tr><td>Has hold shelf</td><td>Select this check box if the circulation desk has a hold shelf. The following fields are then displayed:

Hold shelf sorting – The criteria by which hold shelf items are sorted. Choose from the following options:
Hold Shelf Expiry Time
Hold Shelf Placement Time
Requester Name
Title
Maximum time of hold shelf (Days) – The maximum number of days that an item can stay on the hold shelf
Has hold shelf processing – Select to indicate that the circulation desk can store items that need to be processed before arriving at the hold shelf. Selecting this option displays the Place directly on hold shelf field in the following locations:
Scan In Items page – Scan In Items tab (see Scanning Items on page 84)
Scan In Items page – Change Item Information tab (see Scanning Items on page 84)
Manage Item Returns page (see Returning Items on page 54)

NOTE:
When using a self-check machine to return an item, if Has hold shelf processing is selected, the item goes directly to hold shelf processing. If Has hold shelf processing is not selected, the item is registered as returned and its status appears as Item In Place. It remains in the self-check machine’s bin and must be scanned in by an operator to activate the request.</td></tr>
<tr><td>Notify patron of canceling expired hold</td><td>Select to notify the patron when their item on the hold shelf has expired.</td></tr>
</table>

Table 24. Circulation Desk – General Information Fields

Field	Description
Digitization Department:	
Supports digitization	Select this check box if the circulation desk supports digitization. The **Work time (days)** field is then displayed; the value of this field indicates the number of days for which the item is unavailable (field is for informative purposes – this value is not binding).
Payment Information:	
Credit card	Select to indicate that the circulation desk can accept payment by credit card.
Cash	Select to indicate that the circulation desk can accept payment by cash.
Online	Select to indicate that the circulation desk can accept payment performed online.
Check	Select to indicate that the circulation desk can accept payment by check.
Print receipt?	Select whether the circulation desk can print a receipt.
Receipt copy email	Enter the e-mail address to which you want receipts for payment to be sent.
Self-Check Information:	
Has self check	Select this check box if the circulation desk allows patrons to check in and check out resources using a self-check machine without the assistance of a circulation desk staff member. The following fields are displayed: ■ Integration profile ■ Terminal password For details on configuring a self-check integration profile and associating a profile with a circulation desk, see **Self-Check Machines** in the *Alma Integrations with External Systems Guide*.

2 Click **Next**. The Circulation Desk – Physical Locations page opens. This is the second page of the wizard. Use this page to specify which locations are served by the circulation desk.

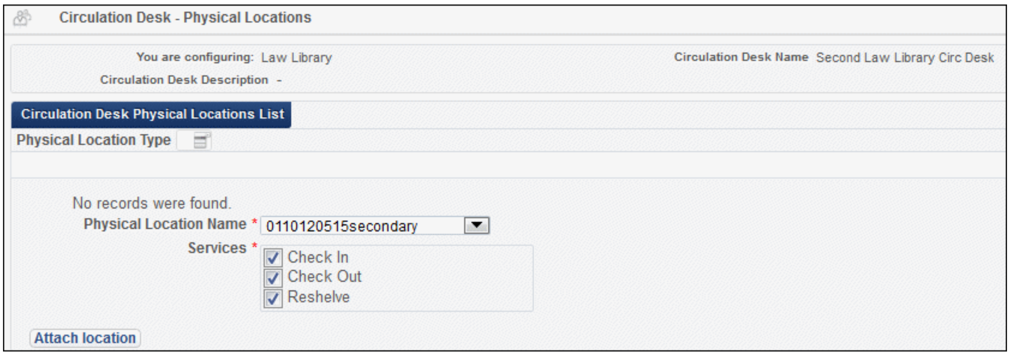


Figure 210: Circulation Desk – Physical Locations Page

a From the **Physical location type** filter, select to display all locations, or only closed, open, or remote storage locations.

b From the **Physical location name** drop-down list, select the name of the location to be added. Note that a location may be served by more than one circulation desk.

c Specify the services — **Check in**, **Check out**, and/or **Reshelve** — that are performed by the circulation desk for the selected location.

d Click the **Attach Location** button to add the selected location to the list of locations that are served by the circulation desk.

3 Click **Next**. The Circulation Desk – Work Order Types page opens. This is the third page of the wizard. Use this page to define work orders types to be associated with the specified circulation desk.

a Click **Add Work Order**. The Add work order dialog box opens.

Figure 211: Add Work Order Dialog Box

b In the **Work order type** field, specify a work order type to be handled by the circulation desk.

c In the **Work order time (days)** field, enter the number of days for which you want the work order to be handled by the circulation desk.

d Click **Add** to add the work order and enable adding another work order, or click **Add and Close** to add the work order and return to the Circulation Desk — Work Order Types page.

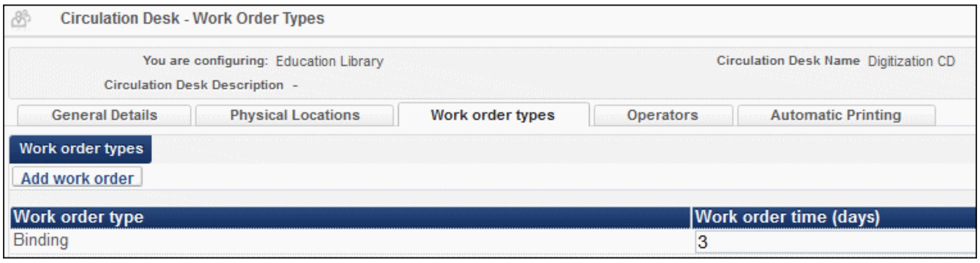


Figure 212: Add Work Order Dialog Box

e Click **Save**. The circulation desk serves as a work order department for the indicated work order types.

4 Click **Next**. The Circulation Desk - Operators page opens. This is the fourth page of the wizard. Use this page to define which operators have permission to perform circulation activities and handle patron requests at the circulation desk.

a Click **Add Operator**. The Add Operator dialog box opens.

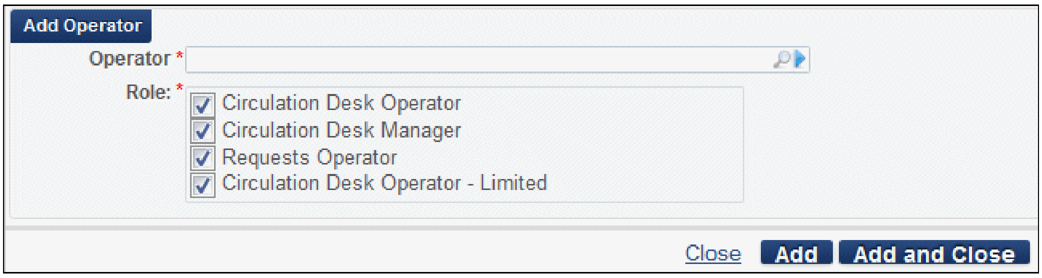


Figure 213: Add Operator Dialog Box

b Select an operator (required) who performs functions at the circulation desk.

c Specify the roles—**Circulation Desk Operator**, **Circulation Desk Manager**, and/or **Requests Operator**—of the operator (see **Adding Roles to Users** in the *Alma Administration Guide* for details on operator roles).

d Click **Add and Close** to close the dialog box. The selected operator is added to the list of operators of the circulation desk.

5 Click **Next**. The Circulation Desk – Automatic Printing page opens. This is the fifth and last page of the wizard. Use this page to specify the rules for automated printing of pick-up-from-shelf slips from the circulation desk.

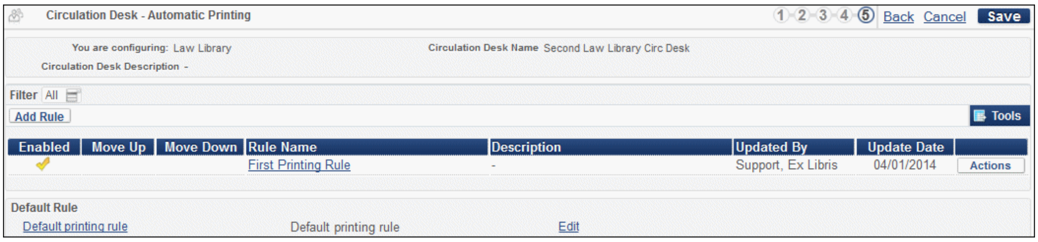


Figure 214: Circulation Desk – Automatic Printing Page

a Click **Add Rule**. The Automatic Printing Rules Editor page opens.

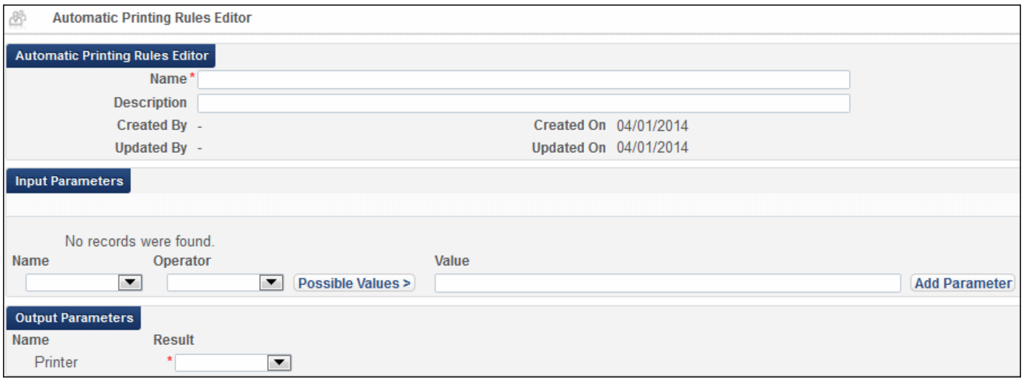


Figure 215: Automatic Printing Rules Editor Page

b Enter the **Name** (required) and **Description** (optional) of the rule you are defining.

c Specify the input parameters for the rule, by *Location* and/or *Material Type*. For example, specifying *Location* = *Archive* and *Material Type=Book* indicates that when the circulation desk's location is the archive and the requested material is a book, automatic printing is invoked according to the setting in the **Output Parameters** section.

d Click the **Add Parameter** button. The set of input parameters is added as a row in the list of input parameters for the circulation desk. Note that all the parameters in the list must be satisfied in order for the output parameter to be applied.

e In the **Output Parameters** section, select the printer to which you want to automatically print the items that satisfy the input parameters, or select **No Printing** to disable automatic printing for the items that satisfy the input parameters.

f Click **Save** on the Automatic Printing Rules Editor page to save the rule.

6 On the Circulation Desk - Automatic Printing page, under **Default Rule**, click **Edit.** The Automatic Printing Rules Editor page displays the default printing rules.

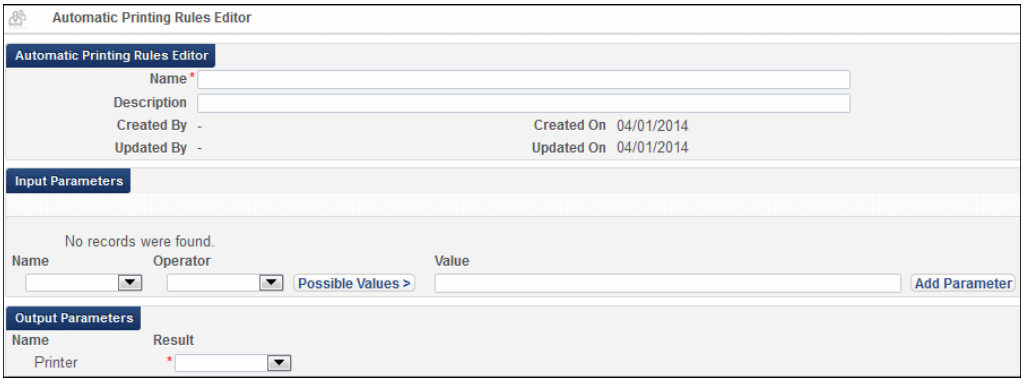


Figure 216: Default Printing Rules

a In the **Automatic Printing Rules Editor** section, modify the default rule name and description if required.

b In the **Output Parameters** section, select the printer on which you want to automatically print the items that do not satisfy the previously defined rules, or select **No printing** to disable automatic printing for the items that do not satisfy the previously defined rules.

c Click **Save** to save your changes to the default rule.

d Click **Save** on the Circulation Desk – Automatic Printing page to store all the circulation desk detail information that you entered and return to the Circulation Desks page. The new circulation desk appears in the list of circulation desks defined for the library.

Editing Circulation Desk Information

You can edit circulation desk information.

To edit circulation desk information:

1 On the Circulation Desks page, select **Actions > Edit** for the specific circulation desk record whose information you want to update.

2 Edit the circulation desk information in the **General Information**, **Physical Locations**, **Operators**, and **Automatic Printing** tabs as required. For information on the tabs, see the pages of the wizard described in **To add a circulation desk:** on page 251.

3 Click **Save** to store the changes you made to the circulation desk.

To delete a circulation desk, select **Actions > Delete** for a circulation desk, and click **Confirm** on the resulting Confirmation Message dialog box.

Configuring Temporary Item Creation Rules

PERMISSIONS:

To configure temporary item creation rules, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

A temporary item creation rule is a rule that applies to a resource sharing library. The temporary item creation rule indicates that items coming from a specified partner must be moved to a specific location. You then configure a regular fulfillment rule which indicates that for items in the location you just specified (in the temporary item creation rule), a specific Terms of Use must be invoked.

For example, you configure a temporary item creation rule which indicates that items coming from partner **A** must be moved to location **X**. You then configure a regular fulfillment rule which indicates that for items in location **X** (the location specified in the temporary item creation rule), terms of use **Y** is to be invoked. For details on configuring regular fulfillment rules, see **To add fulfillment unit rules:** on page 280.

You configure temporary item creation rules on the Temporary Item Creation Rule page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Library > Temporary Item Creation Rules**).

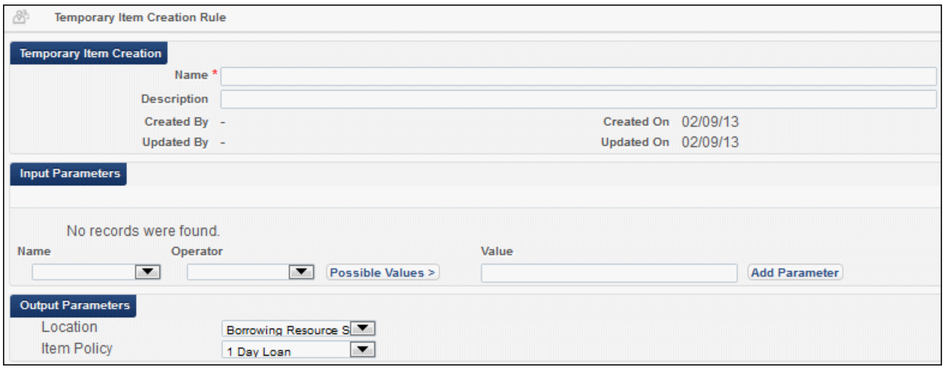


Figure 217: Temporary Item Creation Rule Page

The **Temporary Item Creation Rules** option displays only when you are in the context of a Resource Sharing Library; select **Resource Sharing Library** from the **You are configuring** filter on the Fulfillment Configuration page.

Temporary item creation rules are configured in the same manner as regular fulfillment rules (see **To add fulfillment unit rules:** on page 280).

The temporary item creation rules list displays rules only for the library that is currently being configured.

Configuring SIP2 Bin Configuration

PERMISSIONS:

To configure rules for self-check machine bin usage, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can configure rules for bin usage by SIP2 equipment (self-check machines) that uses the sort bin parameter.

You configure rules for self-check machine bin usage from the SIP2 Bin Configuration Rules page (**Fulfillment > Fulfillment Configuration > Configuration Menu** > **Library** > **SIP2 Bin Configuration**).

Figure 218: SIP2 Bin Configuration Rules Page

NOTE:

Self-check machine bin usage rules can be configured at the institution level only. Select the required institution from the **You are configuring** filter on the Fulfillment Configuration page.

The SIP2 Bin Configuration Rules page displays the following:

- A **Filter** option, enabling you to display all of the SIP2 bin configuration rules, the active SIP2 bin configuration rules, or the inactive SIP2 bin configuration rules
- A list of SIP2 bin configuration rules

The following actions can be performed on this page:

- Adding a SIP2 Bin Configuration Rule (see **Adding a SIP2 Bin Configuration Rule**, below)
- Editing a SIP2 Bin Configuration Rule (see **Editing a SIP2 Bin Configuration Rule** on page **264**)

- Deleting a SIP2 Bin Configuration Rule (**Actions > Delete**)

Adding a SIP2 Bin Configuration Rule

You can add a SIP2 Bin Configuration Rule.

To add a SIP2 bin configuration rule:

1. On the SIP2 Bin Configuration Rules page, click the **Add Rule** button. The SIP2 Bin Configuration page opens.

NOTE:
If you want to create a copy of an existing loan limit rule, select **Actions > Duplicate**. Once you have copied the loan limit rule, you can modify it as needed.

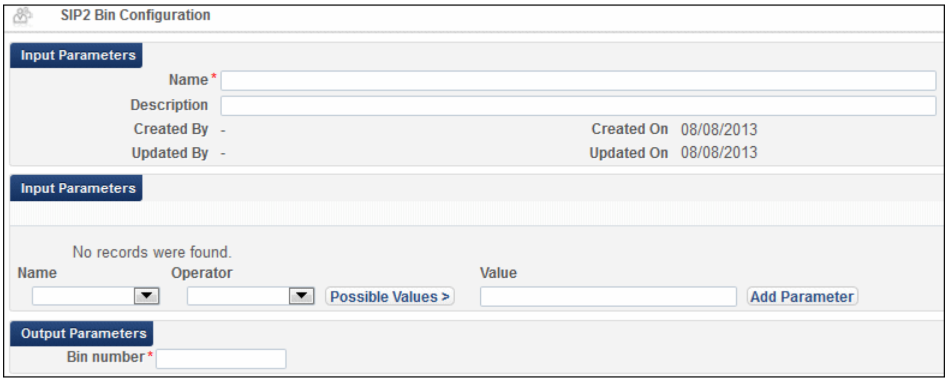


Figure 219: Add SIP2 Bin Configuration Rule

2. In the upper **Input Parameters** section, enter a name and description of the SIP2 Bin Configuration rule.
3. In the lower **Input Parameters** section, specify the components of the input parameter (**Name**, **Operator**, and **Value**). A set of input parameters may look like this: *Library=ArtLibrary*.

   The available **Name** field values (that is, the criteria which determine when the SIP2 Bin Configuration rule is to take effect) and their respective values are described in the following table:

Table 25. SIP2 Bin Configuration Rule – Input Parameter Values

Name	Value
Destination library	The libraries in the institution. For details on adding a library, see **Configuring Libraries** on page 237.

Table 25. SIP2 Bin Configuration Rule – Input Parameter Values

Name	Value
Destination service units	The departments within the institution, such as work order departments and digitization departments. For details on configuring work order departments, see **Configuring Work Order Departments** in the *Alma Administration Guide*.
From call number	The call number from which you specify the rule to take effect when the item’s call number is **greater than** the indicated value.
Is requested	Indicates if the resource has been requested (**Yes** or **No**).
Reshelf item location	The library within the institution where you want to reshelve the item. For details on adding a library, see **Configuring Libraries** on page **237**.
Self check circulation desk	The circulation desk where you want to perform the self check. For details on associating a self-check machine with a circulation desk, see **Self-Check Machines** in the *Alma Integrations with External Systems Guide*.
To call number	The call number from which you specify the rule to take effect when the item’s call number is **less than** the indicated value.

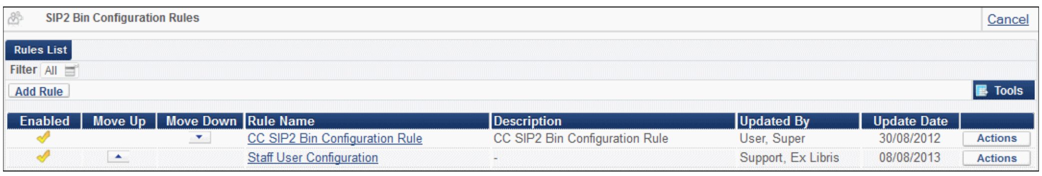
4 Click **Add Parameter**. The set of input parameters is added to the list of parameters for the SIP2 Bin Configuration rule.

5 Repeat the previous two steps to add all of the required parameters for the rule.

NOTE:
All the input parameters must be fulfilled for the rule to be applied.

6 In the **Output Parameters** section, enter a bin number – the number of the bin in which the self-check machine is to place the item.

7 Click **Save** to store the new rule.



8 If you have defined more than one rule, use the **Move Up** and **Move Down** arrows to set the order of the rules. The order of the rules is important, as the system will apply the first (and only the first) appropriate, enabled rule. If no appropriate rule is found, the system will use the default rule.

NOTE:
You can click the gray/yellow check mark to the left of the rule to enable/disable it.

Editing a SIP2 Bin Configuration Rule

You can edit a SIP2 bin configuration rule.

To edit a SIP2 bin configuration rule:

1 On the SIP2 Bin Configuration Rules page, select **Actions > Edit** for the specific rule you want to edit. The SIP2 Bin Configuration page opens.

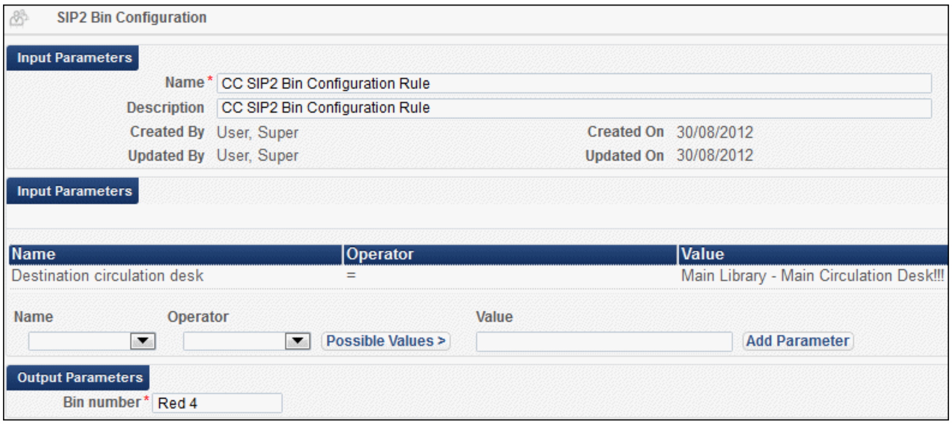


Figure 220: Editing SIP2 Bin Configuration Rules

2 Modify the rule name and description as required.

NOTES:

- You cannot edit an existing set of input parameters. To modify an existing set of input parameters, first delete the existing set, and then add a new set.
- You cannot delete or add a new set of input parameters for the default SIP2 bin configuration rule.

3 Click **Delete** for the specific set of input parameters record you want to delete.

4 Add a new set of input parameters as described in **To add a SIP2 bin configuration rule:** on page **262**.

5 Under **Output Parameters**, enter a bin number – the number of the bin in which the self-check machine is to place the item.

6 Click **Save** to store your changes to the SIP2 bin configuration rule.

Configuring Physical Locations

PERMISSIONS:

To configure physical locations, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

A physical location (that is, a location, shelving location, or holding) is a physical place where items are stored. Each physical location is associated with a library, not the institution. Physical locations may be located off-site in a remote location. For details, see **Configuring Remote Storage Facilities** on page **268**.

You configure physical locations from the Physical Location List page (**Fulfillment > Fulfillment Configuration > Configuration Menu,** click **Physical Locations**).

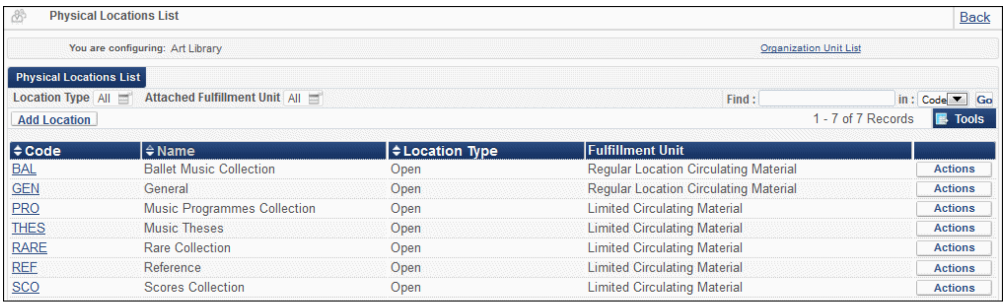


Figure 221: Physical Locations List Page

NOTE:

Ensure that you are within the context of the library whose physical locations you want to configure by selecting the required library from the **You are configuring** filter on the Fulfillment Configuration page. The **Physical Locations** link is enabled only when a library is selected in the **You are configuring** filter on the Fulfillment Configuration page.

The Physical Locations List page displays the following:

- **Filter** options, enabling you to display:
  - All physical locations, or only open, closed, or remote storage locations.
  - Physical locations with any attached fulfillment unit, or only those locations with a specific fulfillment unit attached.
- A **Find** option, enabling you to search locations by either of the **in** drop-down options—code and name.
- A list of physical locations in the library.

To filter the list of physical locations:

- Click the **Location type** drop-down list and select whether to display all locations, or only open, closed, or remote storage locations.
- Click the **Attached fulfillment unit** drop-down list and select whether to display all locations, or only those locations with a specific fulfillment unit attached.

You can click the location code, name, or type headings to sort the list alphabetically—in ascending or descending order.

The following actions can be performed on this page:

- Adding a physical location (see **Adding a Physical Location**, below)
- Editing a physical location (see **Editing a Physical Location** on page **268**)
- Duplicating a physical location (**Actions > Duplicate** and edit the relevant fields)
- Deleting a physical location (**Actions > Delete**)

NOTE:
A location cannot be deleted if there is inventory with which it is associated (that is, there are items with that location code). The items need to be moved to another location before the location can be deleted.

Adding a Physical Location

You can add a physical location.

To add a physical location:

1 On the Physical Locations List page, click the **Add Location** button.

NOTE:
If you want to create a copy of another location to save time, select **Actions > Duplicate**. Once you have copied the location, you can modify it as needed.

2 In the Add Location dialog box, enter the location code and name (both required fields), as well as the external location name, if applicable.

Figure 222: Add Location Dialog Box

3 From the **Location type** list, select the type of the location. Note that the following definitions represent suggested uses of location and do not functionally affect Alma. Distinguishing between different types of locations enables you to filter by location type on the Physical Locations List page.

- **Open** – Suggested to be used for a location that can be accessed by patrons, who can remove an item from the location and then check out the item.
- **Closed** – Suggested to be used for a location that is accessible by library personnel only and is not accessible to patrons.
- **Remote Storage** – Suggested to be used for a remote storage location, which is similar to a closed location, except that it is located off-site. The retrieval of an item from a remote storage location may therefore take longer than retrieving an item from a regular closed location.

4 If the location has a remote storage facility, from the **Remote storage** list, select a remote storage option for the location. Note that a location of any type may be associated with a remote storage facility.

5 From the **Fulfillment unit** list, select a fulfillment unit for the location. The fulfillment unit defines the policy rule to be applied when circulating items from this location. For details, see **Configuring Fulfillment Units, Policies and Item Policies, and Terms of Use** on page **273**.

6 From the **Call number type** list, select a call number type for the location. A call number is a group of numbers and/or letters that indicate where in the library a specific book can be found.

7 Specify the URL of a map that can assist patrons in finding the location.

8 Click **Add and Close** to close the dialog box and to add the location to the list of locations that are defined for the library.

Editing a Physical Location

You can edit a physical location.

To edit physical location information:

1 On the Physical Locations List page, select **Actions > Edit** for a location record.

2 On the Edit Physical Location page, in the **Physical Location Details** section, edit the location information as required. For information on this page, see **To add a physical location:** on page **266**.

3 In the **Physical Location Circulation Desks List** section:

- To create a new circulation desk and associate it with the physical location, click the **Attach New Circulation Desk** button. For additional information, see **To add a circulation desk:** on page **251**.
- To associate an existing circulation desk with the physical location, select the circulation desk from the drop down list, select the services provided by the circulation desk to the physical location, and click the **Attach Existing Circulation Desk** button. For additional information, see **To add a circulation desk:** on page **251**.

4 In the **Holdings Configurations** section:

- From the **Accession placement** drop-down list, select the MARC sub-field that you want to use for the accession number. By selecting a value from the drop-down list, you make the accession number field mandatory when creating a holdings record and cause this sub-field to be indexed and thereby searchable in the repository.
- From the **Call number type** drop-down list, select the method in which the call number is generated.
- Select **Suppress from externalization** to suppress the publishing of items in this location to the discovery interface (Primo or Z39.50).

5 Click **Save** to store the changes you made to the physical location.

Configuring Remote Storage Facilities

PERMISSIONS:

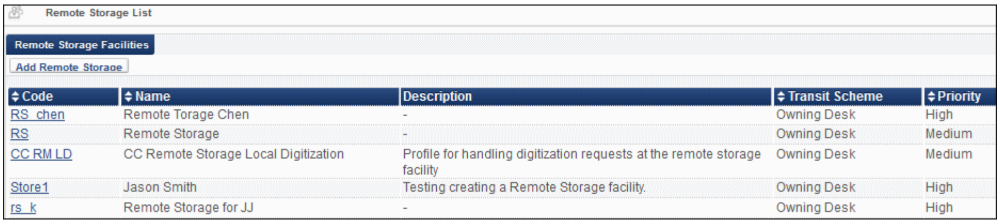
To configure the remote storage facilities, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Libraries may have remote storage facilities where some of their resources are stored. Patrons do not have direct physical access to these remote storage locations. Instead, a patron must place a request for an item that is in a remote storage facility. The requested item is then delivered to a location from which it can be picked up by the patron.

You define which remote storage facilities exist within the institution. When you add a physical location to a library, you can specify that the location is a remote storage facility. For details, see **To add a physical location:** on page **266**.

You configure the remote storage facilities from the Remote Storage List page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Locations > Remote Storage**).



Code	Name	Description	Transit Scheme	Priority
RS_chen	Remote Torage Chen	-	Owning Desk	High
RS	Remote Storage	-	Owning Desk	Medium
CC RM LD	CC Remote Storage Local Digitization	Profile for handling digitization requests at the remote storage facility	Owning Desk	Medium
Store1	Jason Smith	Testing creating a Remote Storage facility.	Owning Desk	High
rs_k	Remote Storage for JJ	-	Owning Desk	High

Figure 223: Remote Storage List Page

NOTE:
Remote storage facilities can be configured at the institution level only. Select the required institution from the **You are configuring** filter on the Fulfillment Configuration page.

You can click the remote storage facility **Code**, **Name**, **Transit Scheme**, or **Priority** headings to sort the list alphabetically in ascending or descending order.

The following actions can be performed on this page:

- Adding a Remote Storage Facility (see **Adding a Remote Storage Facility** on page **269**)
- Editing a Remote Storage Facility (see **Editing Remote Storage Facility Details** on page **271**)
- Deleting a Remote Storage Facility (**Actions > Delete**)

Adding a Remote Storage Facility

You can add a new remote storage facility to the institution. After you add a remote storage facility, the facility will be included in the **Remote storage** drop-down list when you add a physical location to one of the institution's libraries. For details, see **To add a physical location:** on page **266**.

To add a new remote storage facility:

1. On the Remote Storage List page, click the **Add Remote Storage** button. The Add Remote Storage dialog box opens.

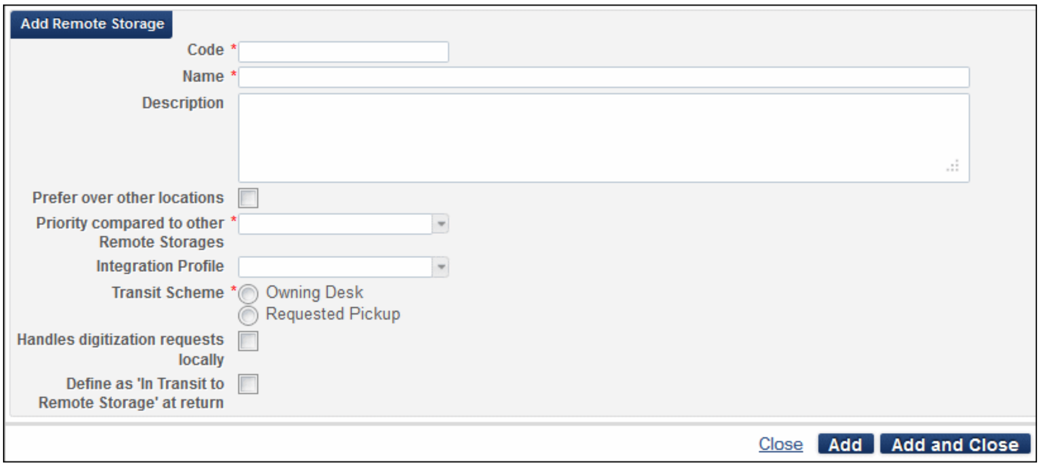


Figure 224: Add Remote Storage Dialog Box

2. Enter a code (required), name (required), and description (optional) for the new remote storage facility.
3. Select **Prefer over other locations** for the specified remote storage location to take priority over non-remote storage locations when fulfilling a request.
   - When you select this option, the **Managed By Library** value on the Resource Request Monitoring page is the remote storage location.
   - When you do not select this option, the **Managed By Library** value on the Resource Request Monitoring page is the non-remote storage location.

   For details on the Resource Request Monitoring page, see **Monitor Requests and Work Orders** on page **76**.
4. Select a priority for the storage facility from the **Priority compared to other remote storages** drop-down list. If a patron requests a specific title, and the title exists in more than one remote storage facility, the system places the request at the remote storage facility with the highest priority.
5. Select an integration profile for the storage facility from the **Integration profile** drop-down list. If a remote storage system is managed by a system other than Alma, Alma uses the specified integration profile to communicate with the other system. For information on configuring a

remote storage system profile, see **Requests to Remote Storage** in the *Alma Integrations with External Systems Guide*.

6 Select the transit scheme for the remote storage facility. The transit scheme defines the location to which to deliver an item that is requested from the remote storage facility for pickup by the requesting patron:

- **Owning desk** – A requested item is transferred to the owning desk of the facility that supplies the request.
- **Requested pickup** – A requested item is transferred to the specific location that was requested by the patron.

7 Select the **Handles digitization requests locally** check box if you want the remote storage facility to digitize requested items.

8 Select the **Define as In Transit to Remote Storage at return** check box to set the item process type to **In Transit to Remote Storage** when returning an item. This option is used when working with items whose locations are connected to remote storage. When the item is returned to an ASRS, a message is sent indicating that the item is in place; the item's status then changes to **Item in Place** and the **In Transit to Remote Storage** process type is removed.

   If this option is not selected, Alma indicates that the item is in place even before the item has actually returned to the remote storage location.

9 Click **Add and Close** to close the dialog box. The new remote storage facility appears at the bottom of the list of remote storage facilities on the Remote Storage List page.

Editing Remote Storage Facility Details

You can edit the details of any remote storage facility.

To edit the details of a remote storage facility:

1 On the Remote Storage List page, select **Actions > Edit** for the specific remote storage facility record whose information you want to update. The Edit Remote Storage Facility page opens.

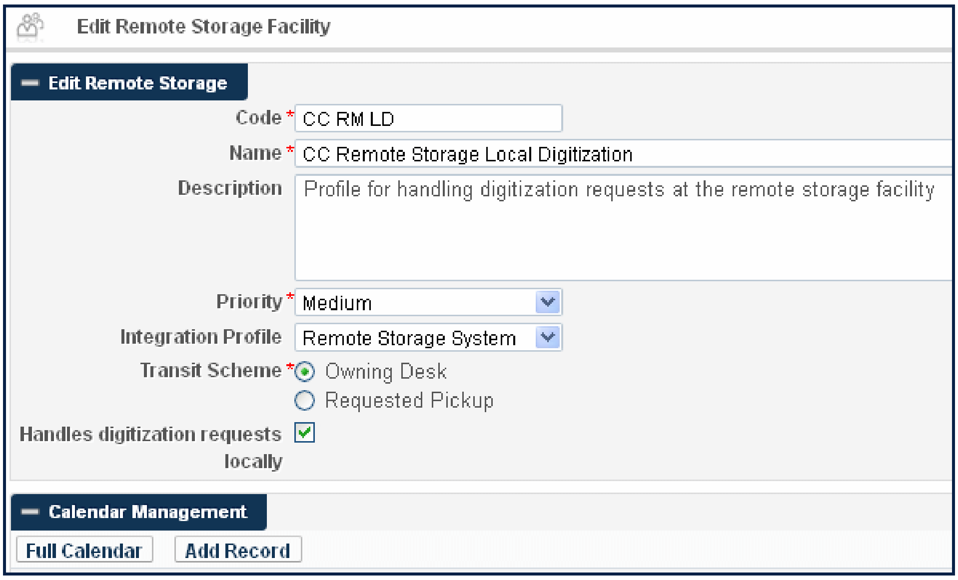


Figure 225: Edit Remote Storage Facility Page

2 In the **Edit Remote Storage** section, edit the details as required. See **Adding a Remote Storage Facility** on page **269** for details.

3 In the **Calendar Management** section, click **Full Calendar** and **Add Record**, as needed, to edit the details that define when the remote storage facility is open and closed. For details, see **Adding/Editing Calendar Details** in the *Alma Administration Guide*.

NOTE:
When adding a record of type **Event**, you can define the hours that a shuttle leaves the remote storage facility to bring items to the library.

4 Click **Save** to store your changes to the remote storage facility details.

Physical Fulfillment

Configuring Fulfillment Units, Policies and Item Policies, and Terms of Use

PERMISSIONS:

To configure fulfillment units, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

A fulfillment unit includes one or more locations within a library that follow the same policies. Fulfillment units include rules which determine the "terms of use" for patrons of the libraries. For example, assume that a library has two locations, Short Loans and Specialist Collections, that enable patrons to loan CD-ROMs for a period of two days only. You could create a fulfillment unit that contains the Short Loans and Specialist Collections locations. Within the fulfillment unit, you could then create a rule that stipulates that if the loaned material is a CD-ROM, then the "two-day loan" terms of use must be applied.

It is recommended to configure fulfillment units on the institutional level. Institutional-level fulfillment units can include locations in any of the libraries within the institution. Library-level fulfillment units can include only those locations that are in the library for which the fulfillment unit is defined.

A sample workflow for configuring fulfillment units, policies and terms of use is as follows:

1. **Create fulfillment units** – Configured to contain one or more locations within a library that follow the same policy (see **Adding a Fulfillment Unit** on page **275**)
2. **Create physical locations and associate them with a fulfillment unit** – A physical location is an area within a library (see **Adding a Physical Location** on page **266**)
3. **Create policies** – The parameters imposed on a patron who receives library services (see **Adding Fulfillment Policies** on page **284**)
4. **Create terms of use** – A group of policies representing the commitment of a library/institution to its patrons (see **Adding a Set of Terms of Use** on page **296**)
5. **Create fulfillment unit rules** – Indicate under which circumstances a terms of use is invoked for a fulfillment unit (see **To add fulfillment unit rules:** on page **280**)

VIDEO:

See *Fulfillment Unit Rules* for a detailed Ask the Expert session on configuring fulfillment unit rules.

You configure fulfillment units on the Fulfillment Units List page (**Fulfillment** > **Fulfillment Configuration** > **Configuration Menu** > **Physical Fulfillment** > **Fulfillment Units**).

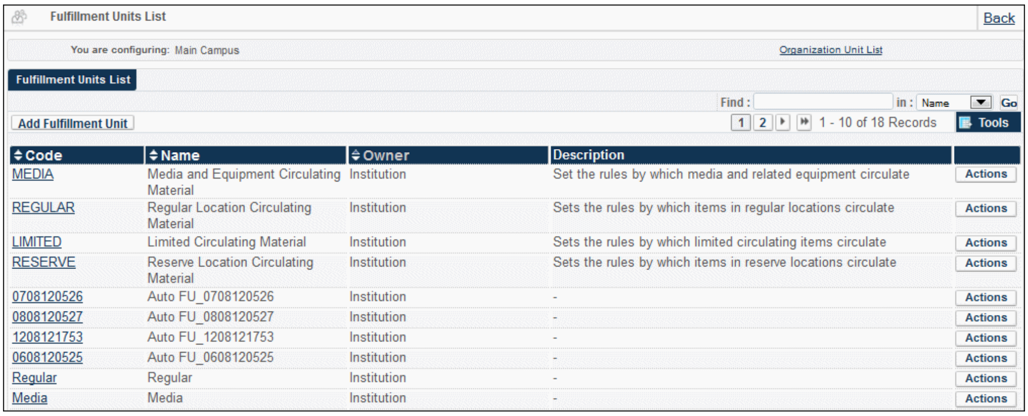


Figure 226: Fulfillment Units List Page

NOTE:

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

The Fulfillment Units List page displays the following:

- A **Find** option. Note the option to search fulfillment units by any of the **in** drop-down options — **Code**, **Description**, and **Name**.
- A list of fulfillment units

Click the fulfillment unit **Code**, **Name**, or **Owner** headings to sort the list alphabetically– in ascending or descending order.

The following actions can be performed on this page:

- Adding a fulfillment unit (see **Adding a Fulfillment Unit**, below)
- Editing a fulfillment unit (see **Editing a Fulfillment Unit** on page **276**)
- Duplicating a fulfillment unit (**Actions** > **Duplicate** and edit the relevant fields)
- Deleting a fulfillment unit (**Actions** > **Delete**)

Adding a Fulfillment Unit

You can add a fulfillment unit to the institution or to a library.

To add a fulfillment unit:

1 On the Fulfillment Units List page, click the **Add Fulfillment Unit** button.

NOTE:
You can create a copy of an existing fulfillment unit by selecting **Actions > Duplicate**. Once you have copied the fulfillment unit, you can modify it as needed.

2 In the **Add Fulfillment Unit** dialog box, enter a code and name (both required) for the new fulfillment unit.

Figure 227: Add Fulfillment Unit Dialog Box

3 Enter a description (optional) for the fulfillment unit.

4 From the **On shelf request policy** drop-down list, select an option to define the way in which an item can be requested when it is on the shelf:

- **Request for pickup anywhere regardless of availability** – All pickup locations that are allowed according to the Pickup Locations policy are available, regardless of whether the item is on the shelf
- **Request for pickup in different library only** – Removes the owning library from the list of available library pickup locations
- **Request for pickup in different campus only** – Removes the owning campus from the list of available campus pickup locations
- **No requesting from available holdings** – If an item from the holdings is available, all items from this holdings may not be requested for pickup at any pickup location. All items from other holdings are not impacted.
- **No requesting** – If an item attached to this rule is available, it may not be requested for pickup at any pickup location.

5 Click **Add and Close** to close the dialog box. The new fulfillment unit is displayed on the Fulfillment Units List page.

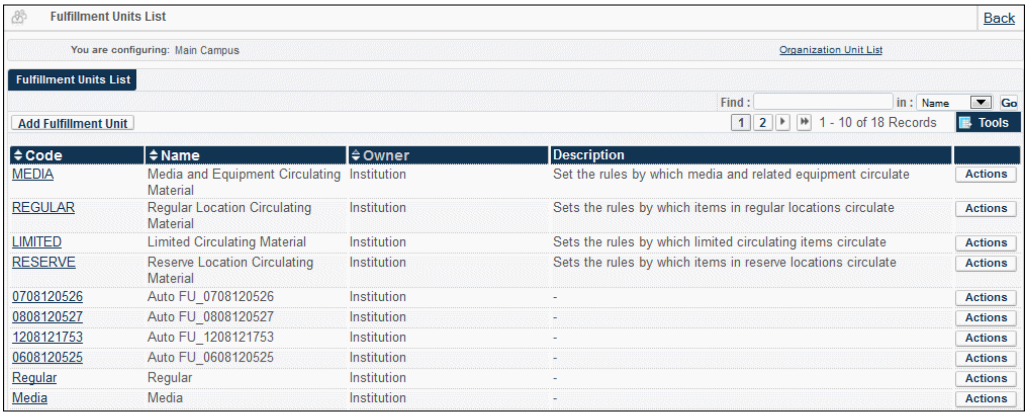


Figure 228: Fulfillment Units List Page

6 After defining a new fulfillment unit, you can specify which physical locations are associated with the fulfillment unit, and which terms of use are to be applied to the fulfillment unit. For details, see **Editing a Fulfillment Unit**, below.

Editing a Fulfillment Unit

Editing fulfillment units includes editing the information configured when adding a fulfillment unit (see **Adding a Fulfillment Unit** on page 275), as well as adding fulfillment locations and fulfillment rules.

On the Fulfillment Units List page, in the **Code** column, click a code or select **Actions > Edit** for a fulfillment unit record. The Edit Fulfillment Unit page opens, where you can edit and add information via the following tabs:

- **Fulfillment Unit Details** – Enables editing the parameters configured when adding a fulfillment unit (see **To edit fulfillment unit details:** on page 277).
- **Fulfillment Unit Locations** – Enables defining the physical locations that are associated with the fulfillment unit. These are the locations to which the terms of use (TOU)/policies referenced by the fulfillment unit rules will be applied (see **To add fulfillment unit locations:** on page 278).
- **Fulfillment Unit Rules** – Enables configuring which terms of use to apply to the fulfillment unit (see **To add fulfillment unit rules:** on page 280).

  For details on configuring rules for a Resource Sharing Library, see **Configuring Temporary Item Creation Rules** on page 260.

To edit fulfillment unit details:

1. On the Fulfillment Units List page, in the **Code** column, click the code, or select **Actions > Edit** for a fulfillment unit. The Edit Fulfillment Unit page opens.

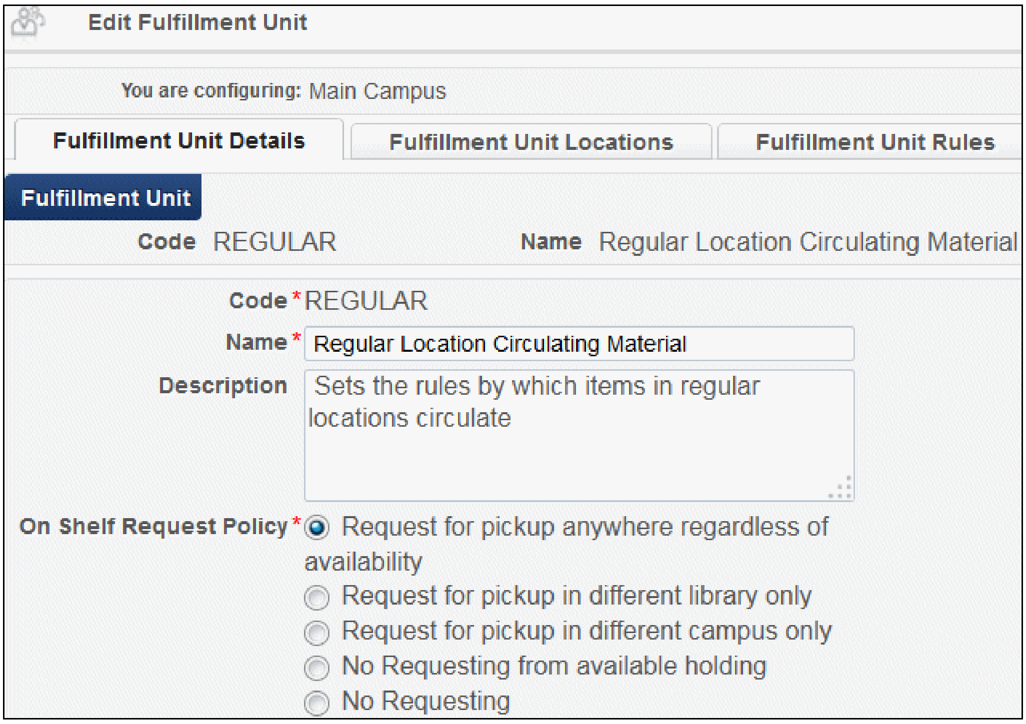


Figure 229: Edit Fulfillment Unit Page – Fulfillment Unit Details Tab

2. In the **Fulfillment Unit Details** tab, edit the general fulfillment unit details as required. For information on the fields displayed on this page, see **To add a fulfillment unit:** on page **275**.

To add fulfillment unit locations:

1 On the Edit Fulfillment Unit page, click the **Fulfillment Unit Locations** tab. The **Edit Fulfillment Unit – Fulfillment Unit Locations** tab page is displayed.

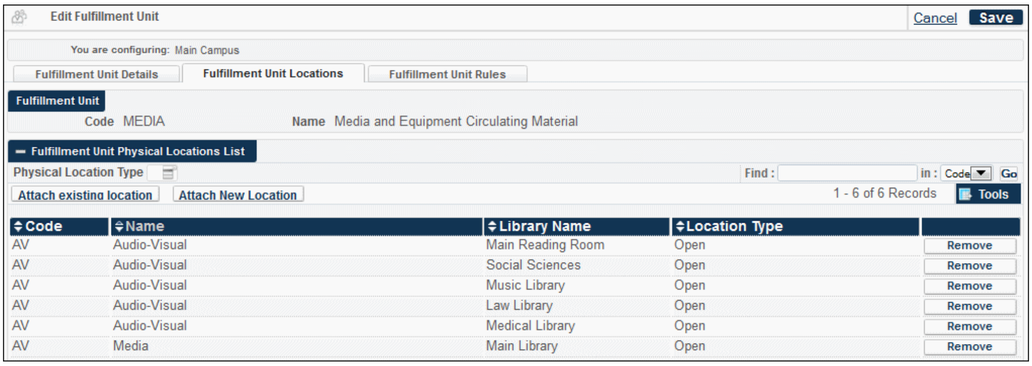


Figure 230: Edit Fulfillment Unit Page – Fulfillment Unit Locations Tab

For details on configuring fulfillment unit locations, see Configuring Physical Locations on page 265.

2 To attach an existing location to the fulfillment unit, click the **Attach Existing Location** button. The Physical Locations List page opens.

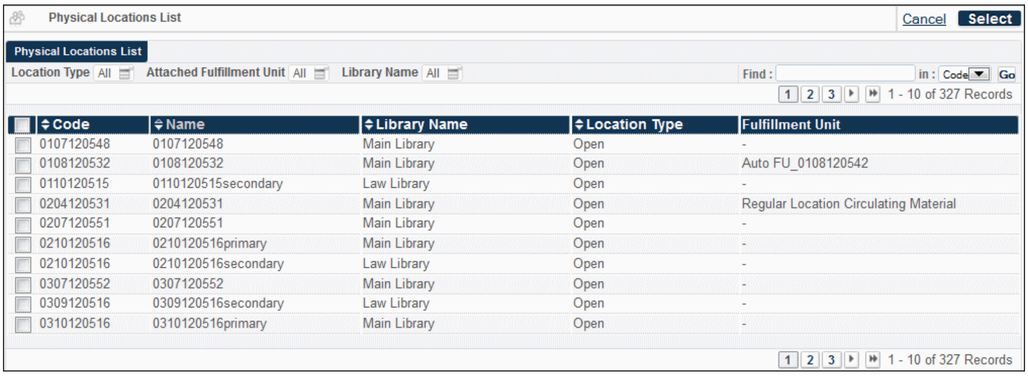


Figure 231: Physical Locations List Page

3 Select the existing locations that you want to attach to the fulfillment unit and click **Select** (you can select multiple locations). The locations are added to the list of locations that are attached to the fulfillment unit.

NOTE:
A location cannot be associated with more than one fulfillment unit.

4 To attach a new location, click the **Attach New Location** button. The Attach New Location dialog box opens.

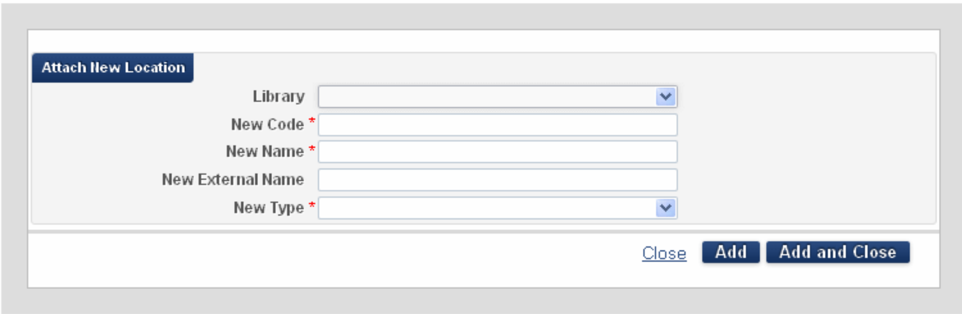


Figure 232: Attach New Location Dialog Box

5 If you are editing an institution-level fulfillment unit, from the **Library** drop-down list, select the library that contains the location to be associated with the fulfillment unit.

6 Enter a new code and new name for the new location (both fields are required), as well as a new external name, if applicable.

7 From the **New type** drop-down list, select from:

- **Closed** – The location is accessible by library personnel only and is not accessible to patrons. A patron must place a request for an item, and the requested item is then retrieved by a library staff member and can be checked out by the patron.
- **Open** – The location can be accessed by patrons, who can remove an item from the location and then check-out the item.
- **Remote storage** – Similar to a closed location, except that the remote storage location is located off-site. Therefore, retrieval of an item from a remote storage location may take longer than from a regular closed location.

8 Click **Add** to attach the location and add another location, or **Add and Close** to close the dialog box and attach the location to the fulfillment unit. The location is added to the list of locations that are attached to the fulfillment unit.

NOTE:
To remove a location from the list of attached locations in the **Fulfillment Unit Locations** tab, click the **Remove** button for a location.

To add fulfillment unit rules:

1 On the Edit Fulfillment Unit page, click the **Fulfillment Unit Rules** tab. The **Edit Fulfillment Unit – Fulfillment Unit Rules** tab page is displayed.

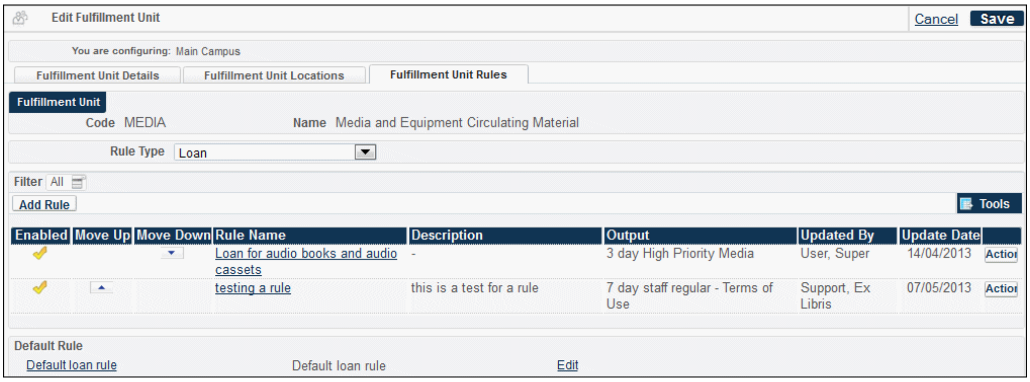


Figure 233: Edit Fulfillment Unit Page – Fulfillment Unit Rules Tab

2 In the **Rule Type** field, select one of the available rule types—**Booking, Loan,** or **Request**.

3 To add a new rule, click the **Add Rule** button. The Fulfillment Unit Rules Editor page opens.

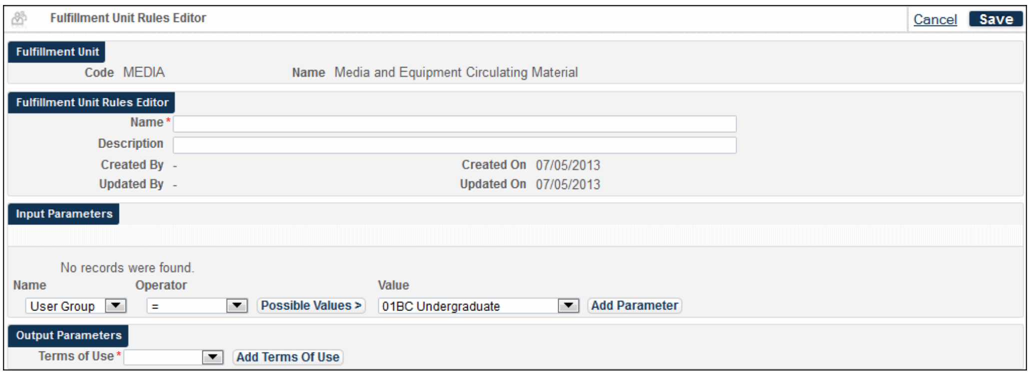


Figure 234: Fulfillment Unit Rules Editor Page

4 In the **Fulfillment Unit Rules Editor** section, specify a name (required) and description (optional) for the rule.

5 In the **Input Parameters** section, specify the components of the input parameter (**Name**, **Operator**, and **Value**). A set of input parameters may appear as follows:

Material Type = DVD-ROM

Possible **Name** values are:

- Item policy
- Job category
- Location
- Material type
- Process type
- User group

When creating a Temporary Item Creation rule, the following values are available:

- Circulation desk
- Days until due date – Enables you create a rule based on the number of days from receiving an item until the item's due date.

  For example:

  - **Name** = Days until due date
  - **Operator** = Greater than
  - **Value** = 15

  These parameters indicate that if there are more than 15 days from the time of receiving the item until the due date, the item belongs to the location indicated in the **Location** field, according to the policy indicated in the **Item policy** field. The **Location** and **Item policy** fields are located in the **Output Parameters** section.
- Resource sharing partner

6 Click the **Add Parameter** button. The set of input parameters is added to the list of parameters for the fulfillment unit rule. All the parameters in the list must be satisfied for the output parameter to be applied (that is, a Boolean AND operator operates between fields).

7 In the **Output Parameters** section, specify the terms of use to be applied when the input parameters are met, and click **Save**. Note that the list of available terms of use is determined dynamically, according to your previous selection of rule type. Click the **TOU Details** button to view the details of the TOU that you select. For details on configuring terms of use, see **Configuring Terms of Use** on page **293**.

When creating a Temporary Item Creation rule, specify the **Location** to which the items are to be moved, and the **Item Policy** which is to be invoked. When working with an NCIP partner, the value specified in the **Location** field is used as the default location for the temporary item that is created when receiving a borrowing request.

8 Click **Save** to store your changes to the fulfillment unit rule. The new rule appears in the list of rules in the **Fulfillment Unit Rules** tab.

9 If you have defined more than one rule for the fulfillment unit, in the **Fulfillment Unit Rules** tab, use the **Move Up** and **Move Down** arrows to set the order of the rules. The order of the rules is relevant in that Alma applies the first (and only the first) appropriate, enabled rule. If no appropriate rule is found, the system uses the default rule.

NOTE:

You can use the rule's **Actions** button to edit, duplicate, or delete a rule. In addition, you can click the yellow check mark to the left of the rule to enable/disable it.

10 Click **Save** to store the fulfillment unit details. The new fulfillment unit appears in the list of fulfillment units on the Fulfillment Units List page.

Configuring Policies

PERMISSIONS:

To configure policies, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

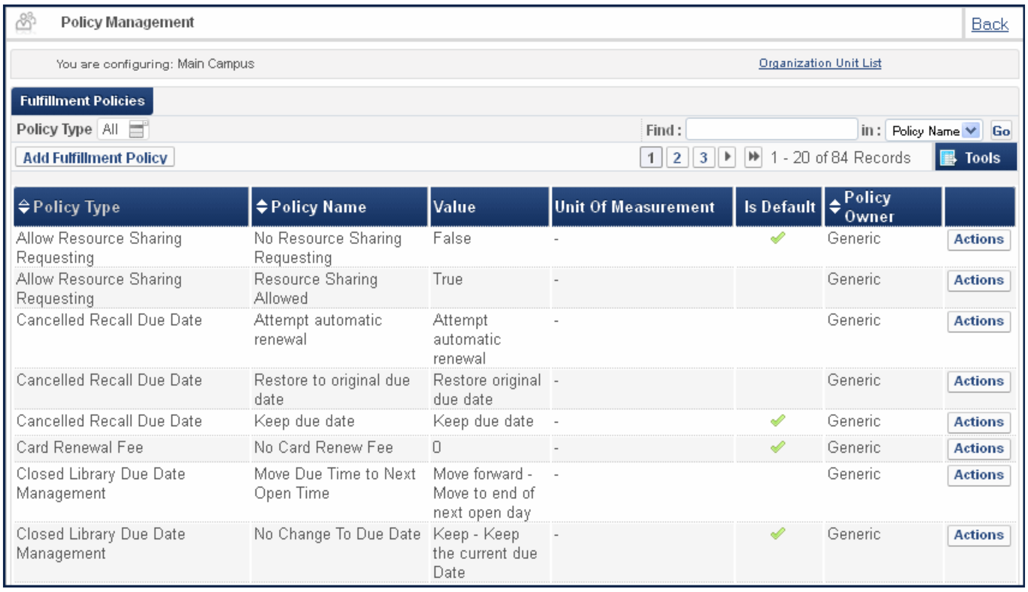
Policies define the library service attributes and parameters that are imposed when a patron receives service from the library. For example, a policy may determine when an item is loaned, the grace period when an item is returned late, or the fee that is due from a patron who loses an item on loan. The policies are divided into policy types such as **Due Date**, **Grace Period**, and **Lost Item Fine**. You can create a number of policies for each policy type. When multiple policies exist for a given policy type, you can specify the default policy to be used.

NOTE:

When you add a new set of terms of use (TOU), the default policies will be the default options in the policy drop-down lists. For details on terms of use, see **Configuring Terms of Use** on page **293**.

Policies are provided out-of-the-box and may be used by both institutions and libraries as long as the owner of the policy is defined as **Generic**. Only when the institution or a library wants to update a given policy will they edit and customize it. From then on, that policy will apply to the organization level for which it was configured, and be inherited downward. For example, updating a policy at the institution level will change the policy owner to **Institution**. This policy may then be utilized by all libraries of the institution. Alternatively, a specific library may exercise autonomy by further configuring the policy.

You configure policies on the Policy Management page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Advanced Policy Configuration**).



Policy Type	Policy Name	Value	Unit Of Measurement	Is Default	Policy Owner	
Allow Resource Sharing Requesting	No Resource Sharing Requesting	False	-	✓	Generic	Actions
Allow Resource Sharing Requesting	Resource Sharing Allowed	True	-		Generic	Actions
Cancelled Recall Due Date	Attempt automatic renewal	Attempt automatic renewal	-		Generic	Actions
Cancelled Recall Due Date	Restore to original due date	Restore original due date	-		Generic	Actions
Cancelled Recall Due Date	Keep due date	Keep due date	-	✓	Generic	Actions
Card Renewal Fee	No Card Renew Fee	0	-	✓	Generic	Actions
Closed Library Due Date Management	Move Due Time to Next Open Time	Move forward - Move to end of next open day	-		Generic	Actions
Closed Library Due Date Management	No Change To Due Date	Keep - Keep the current due Date	-	✓	Generic	Actions

Figure 235: Policy Management Page

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

The Policy Management page displays the following:

- A **Policy type** filter option, enabling you to display all policies, or only policies of a specified type
- A **Find** option, enabling you to search policies by the **in** drop-down option — **Policy Name**
- A list of policies

Click the policy type, name, or owner headings to sort the list alphabetically—in ascending or descending order.

The following actions can be performed on this page:

- Adding new fulfillment policies (see **Adding Fulfillment Policies**, below)
- Editing fulfillment policies (**Actions > Edit**)
- View terms of use related to the policy (**Actions > Show related terms of use**)
- Duplicating a policy (**Actions > Duplicate** and edit the relevant fields)

- Deleting a policy (**Actions > Delete**)

Adding Fulfillment Policies

You can add a new fulfillment policy to a TOU.

To add new policies:

1 On the Policy Management page, click the **Add Fulfillment Policy** button. The Select Fulfillment Policy Type page opens, displaying a list of policies. This is the first page of a two-page wizard.

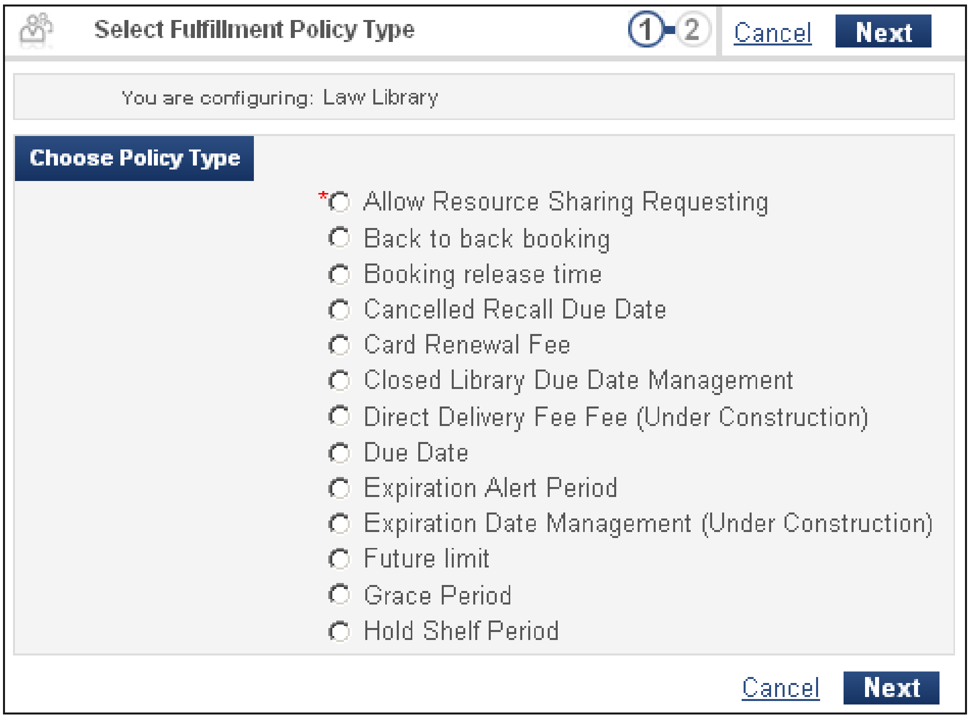


Figure 236: Select Fulfillment Policy Type Page (Partial List)

NOTE:
To duplicate an existing policy, select **Actions > Duplicate** and then edit it (see **Configuring Terms of Use** on page **293**).

---

2 On the Select Fulfillment Policy Type page, select the policy type.

Table 26. Fulfillment Policy Types

Fulfillment Policy Type	Description
Booking:	
Back to Back Booking	Indicates the minimum amount of time required between consecutive bookings (booking requests for the same resource & requester). If **Value type = None** for this policy type, there is no minimum and a requester can configure a booking that immediately follows another booking.
Booking Release Time	Indicates the amount of time after the booking request takes effect that the institution holds the resource for the requesting patron. No other patrons can borrow the resource until after the booking release time passes. If the booking release time passes and the requesting patron does not claim the resource, the booking request is still in effect but the resource can be loaned to another patron.
Future Limit	Indicates how far in advance an item can be reserved through a booking request.
Is Item Bookable	Indicates whether booking is allowed for the specified item.
Maximum Allowed Booking Length	Indicates the maximum permitted duration of the booking request.
Preview Period	Indicates the amount of time prior to the booking period that the requester can borrow the item. During this time frame, the resource is blocked from patrons other than the requester.
Pickup Locations	Indicates from where the item can be picked up.
Loan:	
Cancelled Recall Due Date	Defines what is to be done to a loan's due date when a recall that has been placed on the loan is canceled. The options are to: ■ restore the original due date ■ keep the same recalled due date unchanged ■ attempt to renew the recalled loan using standard renew procedures

Table 26. Fulfillment Policy Types

Fulfillment Policy Type	Description
Closed Library Due Date Management	How to manage fulfillment activities when the library is closed. The available options, displayed in the **Value** field of the Policy Details page when this policy type is chosen, are: ■ **Keep** – Keep the current due date ■ **Move backward** – Move to the end of the previous open day ■ **Move forward** – Move to the beginning of the next open day ■ **Move to the end of the next open day** (affects due dates that would otherwise fall on a day that the library is closed)
Direct Delivery Fee	Currently under construction
Due Date	The length of time the item may be borrowed. You can specify the following period types for due date policies: ■ **Fixed** – allows you to specify a due date based on your institution's calendar, such as the **End of Term**. ■ **Non Fixed** – allows you to set a date based on the date the item was borrowed. The following values are valid: **Days**, **Exact Days**, **Hours**, **Minute**, **Month**, and **Week**. If you set the **Unit of Measurement** field to **Days**, **Month**, or **Week**, you can also specify a specific time. If you don't specify a time, the default is your institution's closing time. The original date that the item was borrowed is not included when determining the due date. For example – an item loaned on April 1 with a loan period of 6 days is due on April 7.
Expiration Date Management	Currently under construction
Grace Period	The length of time that the item may be returned late with no fine being applied. The grace period is calculated from and including the item's due date. For example, if the item's due date is March 1 and the grace period is 5 days, the end of the grace period is March 5, after which a fine is applied. **NOTE:** If the grace period passes and the item is not returned, the fine is applied retroactively to the due date.
Is Loanable	Can a patron loan the item. An item on loan cannot be renewed.

Table 26. Fulfillment Policy Types

Fulfillment Policy Type	Description
Is Recallable	Can the library recall the item if the item is on loan. If this setting is enabled and **Recalls Loans = No** on the Loan Recalls (Request Configuration) mapping table, the loan is not recalled (see **Configuring Loan Recall Requests** on page **316**). Only if **Recalls Loans = Yes** is the TOU policy applied. **NOTE:** An item can be renewed only if both **Is Recallable** is not enabled and **Recalls Loans = No** on the Loan Recalls mapping table (see **Configuring Loan Recall Requests** on page **316**). When recalling a single copy of an item, Alma recalls the item that has been on loan the longest (that is, the item with the earliest loan date). For effects that recalling an item has on other areas of Alma, see **Item Recall Effects** on page **291**.
Is Renewable	Can a patron renew the loan on the item.
Lost Item Fine	Amount to pay in local currency if the item is lost.
Lost Item Replacement Fee	Amount to pay in local currency to replace a lost item. **NOTE:** Replacement costs can be set per item. If a replacement cost exists for a specific item, it is used when the item is rendered “lost.” If a replacement cost does not exist for an item, Alma uses the value from the Lost Item Replacement Fee policy.
Lost Item Replacement Fee Refund Ratio	Percentage of the replacement fee that is returned to a patron when the patron returns a lost item for which a replacement fee was charged.
Maximum Renewal Period	The maximum amount of time that the loan is allowed to endure. This value includes the time of the actual loan as well as time added to the loan by renewals. For example, if this value is **21**: ■ An item on 14 day loan can be renewed for up to 7 days (**14 + 7 = 21**). ■ An item on 10 day loan can be renewed for up to 11 days (**10 + 11 = 21**).
Maximum Fine	Maximum amount that a patron can be fined.

Table 26. Fulfillment Policy Types

Fulfillment Policy Type	Description
Overdue Fine	The amount that the patron needs to pay, per period, if the item was returned late. An item is considered overdue starting on the day after the due date.
Recalled Overdue Fine	The amount that the patron needs to pay, per period, if a recalled item was returned late.
Recall Period	The amount of time that a patron is given to return a recalled item.
Renew Fee	The amount that the patron needs to pay for renewing an item.
Requested Item Due Date	The length of time that the item may be borrowed if the item is requested by another patron. Alternatively, you can select a fixed period as defined in your institution's calendar, for example **End of Term**.
Resource Sharing:	
Allow Resource Sharing Requesting	Is resource sharing allowed.
Is Requestable for Resource Sharing	Can a patron request resource sharing.
Resource Sharing Fee	The amount that the patron needs to pay for resource sharing.
Resource Sharing Requests Limit	The maximum number of resource sharing requests.
Request:	
Hold Shelf Period	The length of time that a requested item will remain on the hold shelf without being fulfilled. The Hold Shelf Period value does not include days that the library is closed. For example, if the Hold Shelf Period value is set to 5 days and the library is closed for 2 days during that period, the 2 days are not calculated as part of the Hold Shelf Period, and the item remains on the hold shelf for a total of 7 days (that is, 5 days on which the library is open).
On Shelf Request Policy	The policy to be used when on shelf items are requested. The available options are: **Allow for pickup anywhere regardless of availability** and **Use fulfillment unit definition**.
Is Digitizeable	Can a patron request a digital copy of the item.

Table 26. Fulfillment Policy Types

Fulfillment Policy Type	Description
Is Requestable	Can a patron request to borrow the item.
Personal delivery	Can a patron request personal delivery of the item. Select one of the following options to configure personal delivery: ■ Personal Delivery - All (Deliver items to a home or an office address) ■ Personal Delivery - Home (Deliver items only to a home address) ■ Personal Delivery - None (Do not deliver items at all) ■ Personal Delivery - Office (Deliver items only to an office address) **NOTE:** A patron can request personal delivery only if he/she has defined a home/work address on the User Details page (see **Working With Contact Information** in the *Alma Administration Guide*).
Personal delivery fee	Is a delivery fee associated with the personal delivery of a physical item.
Pickup Locations	The locations where a patron may request to pick up a requested item. The available options are: **At any reading room**, **At library reading room**, **In institution**, **In library, In Campus**, and **In Patron Affiliated Campus**. **In Campus** refers to the campus to which the item's library belongs. **In Patron Affiliated Campus** refers to the campus to which the patron belongs. **NOTE:** **In institution** includes all of an institution's libraries and not only those whose circulation desk has a Hold Shelf.
Request Priority	Determines the priority of a request in the request queue. For details on request priority, see **Request Priority** on page **80**.
User Registration:	
Card Renewal Fee	Amount to pay in local currency to renew a library card. This fee is applied when renewing the user record.

Table 26. Fulfillment Policy Types

Fulfillment Policy Type	Description
Expiration Alert Period	Amount of time that a patron is alerted before the patron's card expires. This relates to the expiration of the user record and not to the Patron role.
Patron Renewal Period	The amount of time by which a patron's registration is renewed. The estimated date when the user is expected to leave the institution. For more information regarding authorization and authentication, see **Expiration Date** in the *Alma Administration Guide*.
Patron Registration Fee	Amount to pay in local currency to register a patron. This fee is applied upon creating a Patron role or renewing an existing Patron role. It is applied to both internal and external users.
Renew Scope	The scope with which a patron's registration can be renewed. The available options are: **Institution**, **Library**. This relates to the scope of the Patron role and is applied when the role is renewed.
User Registration Fee	Amount to pay in local currency to register a new user. This applies to an internal user only.
User Renewal Period	The amount of time by which a user's registration is renewed.

3 Click **Next**. The Policy Details page opens. This is the second page of the two-page wizard.

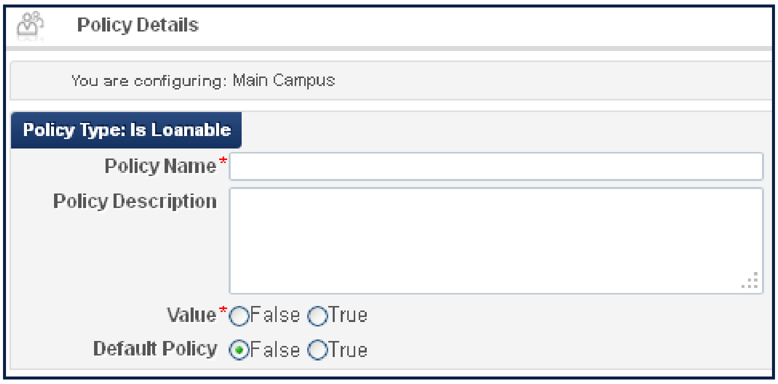


Figure 237: Select Fulfillment Policy Type Page

4 Enter a policy name (required) and policy description (optional).

NOTE:

The due date policy's description is what is shown in the Primo Get It tab's item list. If no description is defined, the Get It tab displays the due date policy's value and unit of measurement.

5 For the **Default policy**, specify **False** or **True** to indicate whether the new policy is the default policy for the policy type when multiple policies exist for a given policy type. Note that when you add a new set of terms of use, the default policies will be the default options in the policy drop-down lists. For details on configuring terms of use, see **Configuring Terms of Use** on page **293**.

6 Specify the remaining options for the policy, which vary according to the selected policy type.

7 Click **Save**. The details of the policies are stored, and the policy is added to the list of policies. If necessary, use the available filter and search controls to locate the new policy in the list.

Item Recall Effects

Following are possible effects on the Alma system when the **Is Recallable** policy type is selected and an item is recalled:

- The due date of the item is updated when the **Recall Period** policy value is active and is earlier than the current due date.

  For example, if the item's due date is May 10 and an item is recalled on May 7 with a **Recall Period** value of 5 days, the item's due date is effectively May 12 (5 days after the item was recalled). An item's due date can be changed after the loan has been recalled.

- The overdue fine is increased when the **Recalled Overdue Fine** policy value is active and is greater than the **Overdue Fine** policy value.

  For example, if the **Overdue Fine** value is $5 and the **Recalled Overdue Fine** value is $10, a recalled item that is overdue incurs a fine of $10 instead of $5.

Configuring Item Policies

PERMISSIONS:

To configure item policies, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Item policies are optionally used to create exception rules in the fulfillment unit rules (see **Configuring Fulfillment Units, Policies and Item Policies, and**

Terms of Use on page 273) so that specific items in a certain location will circulate differently than the typical items stored in this location.

You configure item policies on the Code Table page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Item Policy**). You should define item policies on the institution level only; defining library-level item policies is strongly discouraged.

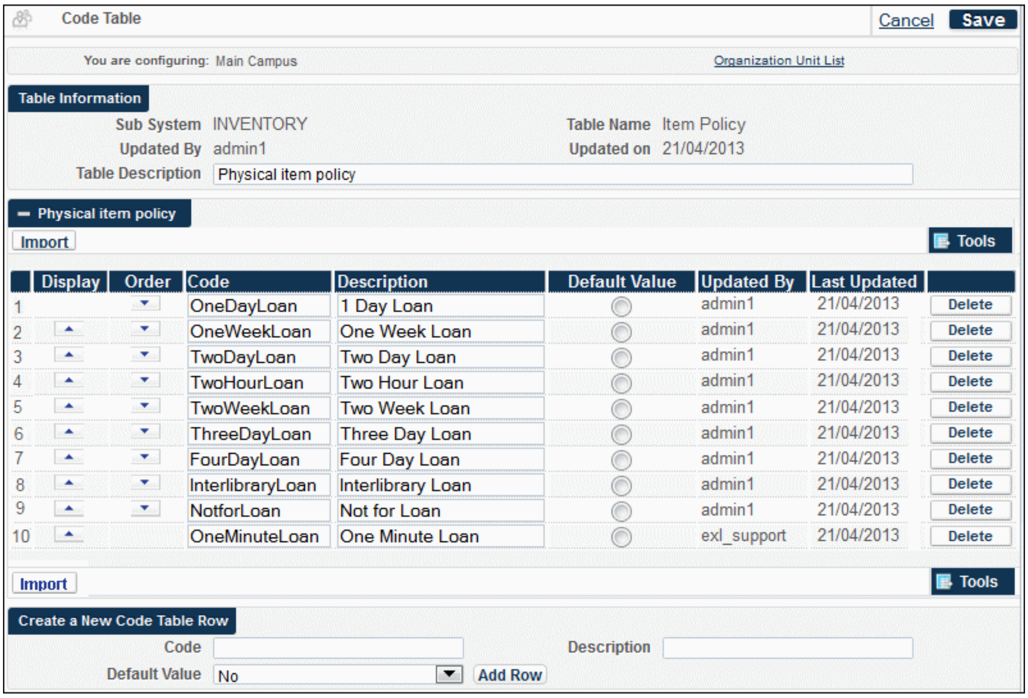


Figure 238: Code Table Page – Item Policies

NOTE:

Ensure that you are within the context of the institution whose item policies you want to configure by selecting the required institution from the **You are configuring** filter on the Fulfillment Configuration page.

The Code Table page displays:

- Details about the item policies for the institution. Most of the details are system-generated and cannot be edited.
- A list of the item policies that are defined for the institution.
- A group of input fields that enable you to define and create a new item policy.

To add a new item policy:

1 On the Code Table page, in the **Create a New Code Table Row** section, enter a code for the new item policy.

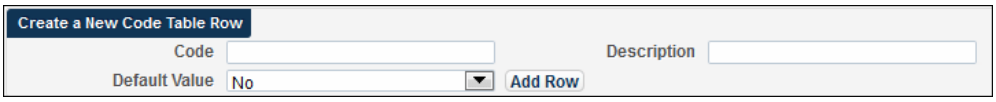


Figure 239: Create a New Item Policy Row Section of the Code Table Page

2 Enter a code and description for the new item policy.

3 From the **Default value** drop-down list, select **Yes** if the new item policy will be the default item policy whenever an **Item policy** drop-down list is displayed.

4 Click the **Add Row** button. The new item policy is displayed at the bottom of the list of physical item policies. Use the **Move Up** and **Move Down** arrows to set the order of the item policy.

5 Click **Save** to store the new item policy details in the system.

To edit the details of an item policy:

1 On the Code Table page, under **Physical Item Policy**, locate the item policy that you want to edit.

2 Modify the item policy code and description as required.

3 Select **Default value** if the new item policy will be the default item policy whenever an **Item policy** drop-down list is displayed.

4 Click **Customize** to store the modified item policy in the system.

5 Use the **Display** or **Order** up and down arrows to set the order of the item policy. The item policies will appear in the defined order in all **Item policy** drop-down lists.

To delete an item policy, click **Delete** for the relevant policy.

Configuring Terms of Use

PERMISSIONS:

To configure terms of use, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

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. TOU can be seen as the "contract" between the library and the patrons, and are associated with a specific type of fulfillment activity, such as a loan, a request, or user registration. For details on the policies that can be included in terms of use, see **Configuring Policies** on page **282**.

The fulfillment unit rules determine which TOU to employ when delivering a particular service to the patron. For details, see **Configuring Fulfillment Units, Policies and Item Policies, and Terms of Use** on page **273**.

VIDEO:

For information about viewing fulfillment rules that are associated with a terms of use, see the *Navigate to Fulfillment Rules from Terms of Use* video (1:58 mins).

TOU are provided out-of-the-box and may be used by both institutions and libraries, as long as the TOU owner is defined as **Generic**. Only when the institution or a library wants to modify a given TOU will they edit and customize it. From then on, this TOU applies to the organization level for which it was configured, and is inherited downward. For example, updating TOU at the institution level changes the TOU owner to **Institution**. This TOU may then be utilized by all the institution's libraries or, in turn, the library may configure a TOU of its own and be autonomous in its TOU settings.

Usually, libraries create their own TOU during implementation instead of editing existing ones. Libraries can define the policies and TOU that they want to use, and these are created for them by the implementation team at the institutional level.

If an item belongs to a location that does not have terms of use (for example, the location does not belong to any fulfillment unit), the system determines the TOU based on the default TOU at the institution level. If no default TOU is defined at the institution level, the out-of-the-box, Ex Libris TOU – labeled **Generic** – is used.

You configure terms of use on the Terms of Use Management page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Terms of Use and Policies**).

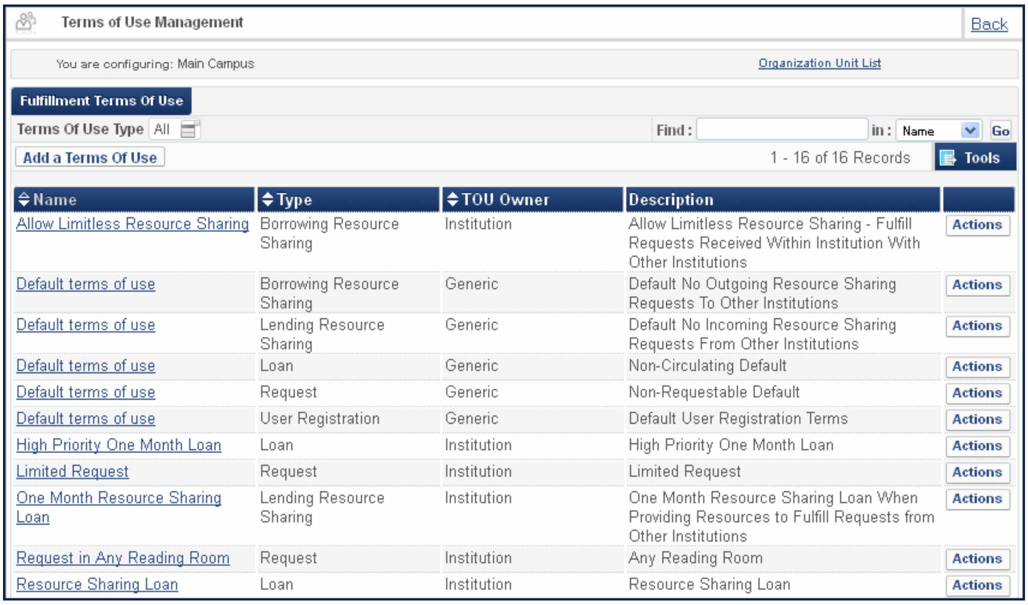


Figure 240: Terms of Use Management Page

NOTE:

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

The Terms of Use Management page displays the following:

- A **Terms of use type** filter option, enabling you to display all terms of use, or only terms of use of a specified type
- A **Find** option, enabling you to search terms of use by either of the **in** drop-down options — **Description** and **Name**
- A list of the fulfillment terms of use

Click the terms of use **Name**, **Type**, or **Owner** headings to sort the list alphabetically — in ascending or descending order.

The following actions can be performed on this page:

- Adding a Set of Terms of Use (see **Adding a Set of Terms of Use**, below)
- Editing a Set of Terms of Use (**Actions > Edit**)
- Viewing a Set of Terms of Use (**Actions > View**)
- Deleting a Set of Terms of Use (**Actions > Delete**)
- Viewing the fulfillment rules related to the terms of use (see **Viewing Related Fulfillment Rules** on page 302)

NOTES:

- You can permanently delete a TOU record only if the owner is the **Institution**. If the owner is **Generic**, you cannot delete the terms of use.
- A TOU in use in a fulfillment unit rule cannot be deleted.

Adding a Set of Terms of Use

You can add a new set of terms of use to the institution or to a library within the institution.

To add a new set of terms of use:

1 On the Terms of Use Management page, click the **Add a Terms of Use** button. The Select Fulfillment Terms of Use Type page opens. This is the first page of a three-page wizard.

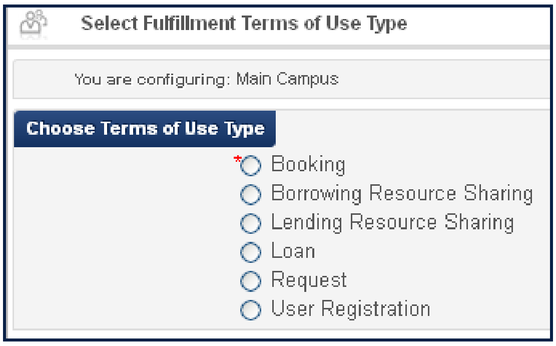


Figure 241: Select Fulfillment Terms of Use Type Page

2 Select the terms of use type:

- **Booking** – Aggregates a number of policy types that are required to allow reserving of material at a specific time
- **Borrowing Resource Sharing** – Aggregates a number of policy types that are required to allow borrowing of resource sharing material to take place
- **Lending Resource Sharing** – Aggregates a number of policy types that are required to allow lending of resource sharing material to take place
- **Loan** – Aggregates a number of policy types that are required to allow a loan to take place
- **Request** – Aggregates a number of policy types that are required to allow a request to take place

VIDEO:

For more information on the Alma requests flow, see the *Alma Requests Flow* video (1 hr 1:22 mins).

- **User registration** – Aggregates a number of policy types that are required to allow the registration of a user to take place

3 Click **Next**. The second page of the three-page wizard opens.

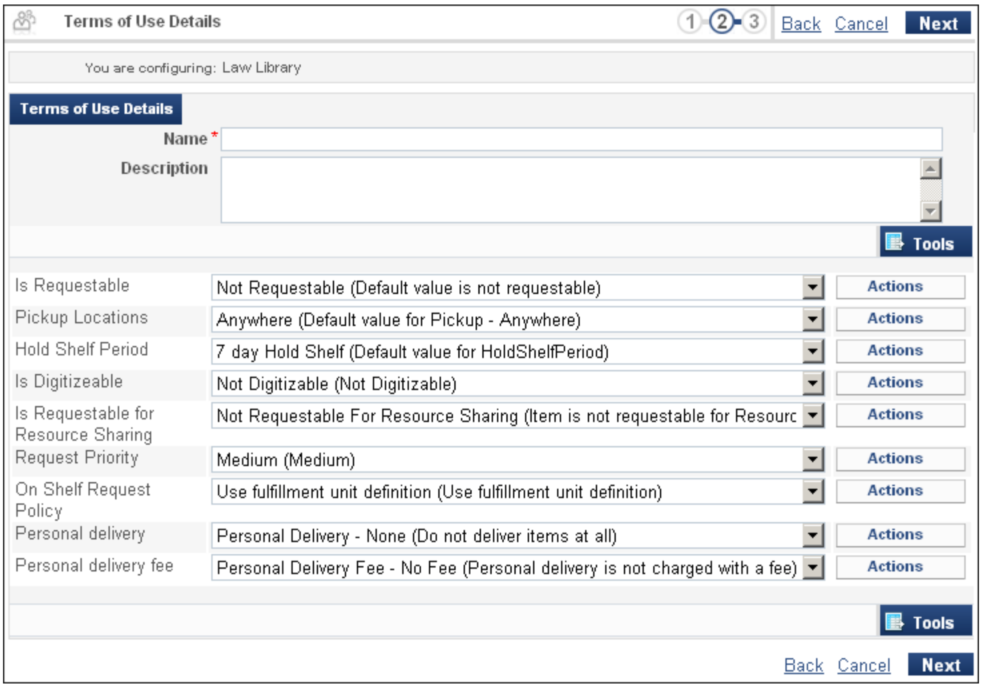


Figure 242: Terms of Use Details Page - Second Page of the Wizard

4 Enter a name for the terms of use (required) and a description (optional).

NOTE:

The remaining options in the Terms of Use Details page are the policy types that are available for the terms of use type that you selected on the previous page of the wizard.

5 Select from the predefined drop-down lists to specify the policies for the new set of terms of use. Note that the policy options in the drop-down lists are the relevant policies that have been defined. For details, see **Configuring Policies** on page **282**.

For descriptions of the displayed policies, see **Table 26**.

Values selected on this page for the specified Terms of Use override the values configured in Fulfillment Configuration.

NOTE:

You can use the terms of use's **Actions** button to add a policy (see **To add new policies:** on page **284**), edit and update a policy (see **Configuring Terms of Use** on page **293**), or edit a policy via add (see **Configuring Terms of Use** on page **293**). Editing a policy changes the policy and makes the change in all TOU already using this policy. Edit via add changes the policy, but adds the change as a new policy and therefore does not change any other TOU already using this policy.

Note that you can modify policies for existing loans by selecting **Actions > Edit policy via update** and then selecting the **Should policy change be applied retroactively?** check box.

6 Click **Next**. The third page of the wizard opens.

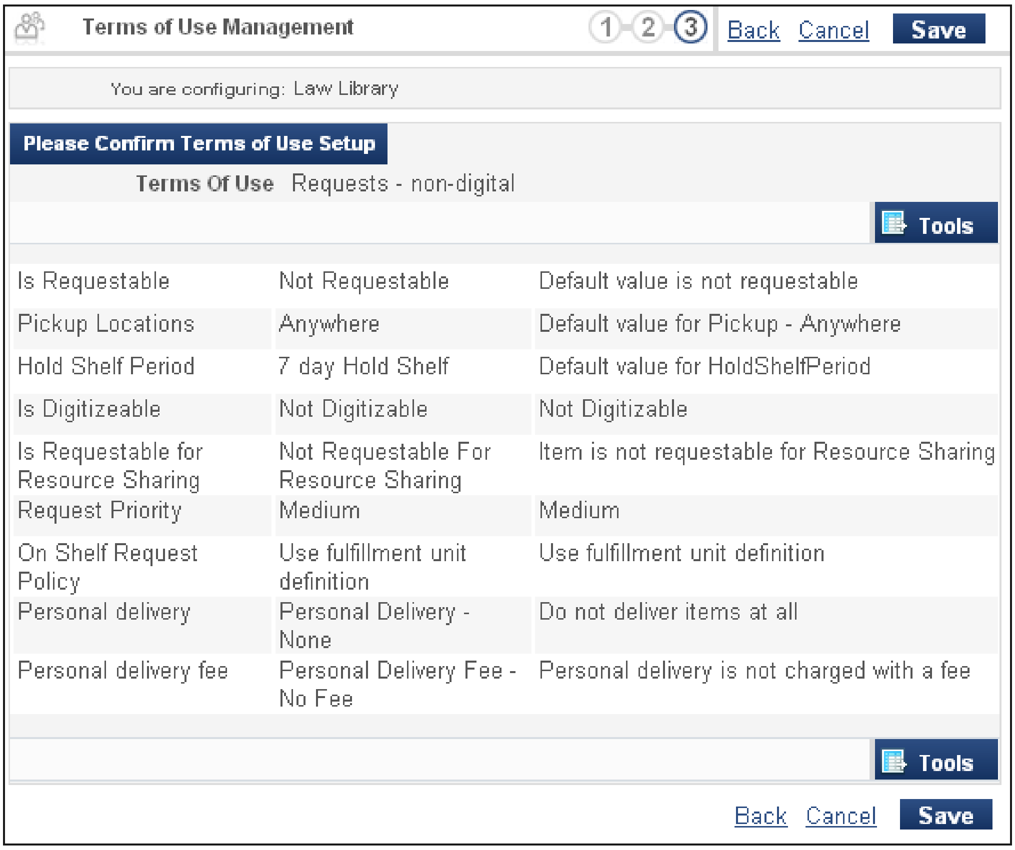


Figure 243: Terms of Use Management Page - Third Page of the Wizard

7 Review the details of the new terms of use. Click **Back** to make changes to the terms of use.

8 Click **Save** to store the details of the new set of terms of use. The new set of TOU is added to the list of terms of use. If necessary, use the available filter

and search controls to locate the new TOU in the list. For details on Terms of Use, see **Configuring Terms of Use** on page 293.

9 To view a terms of use record, select **Actions > View**. A page detailing the terms of use is displayed.

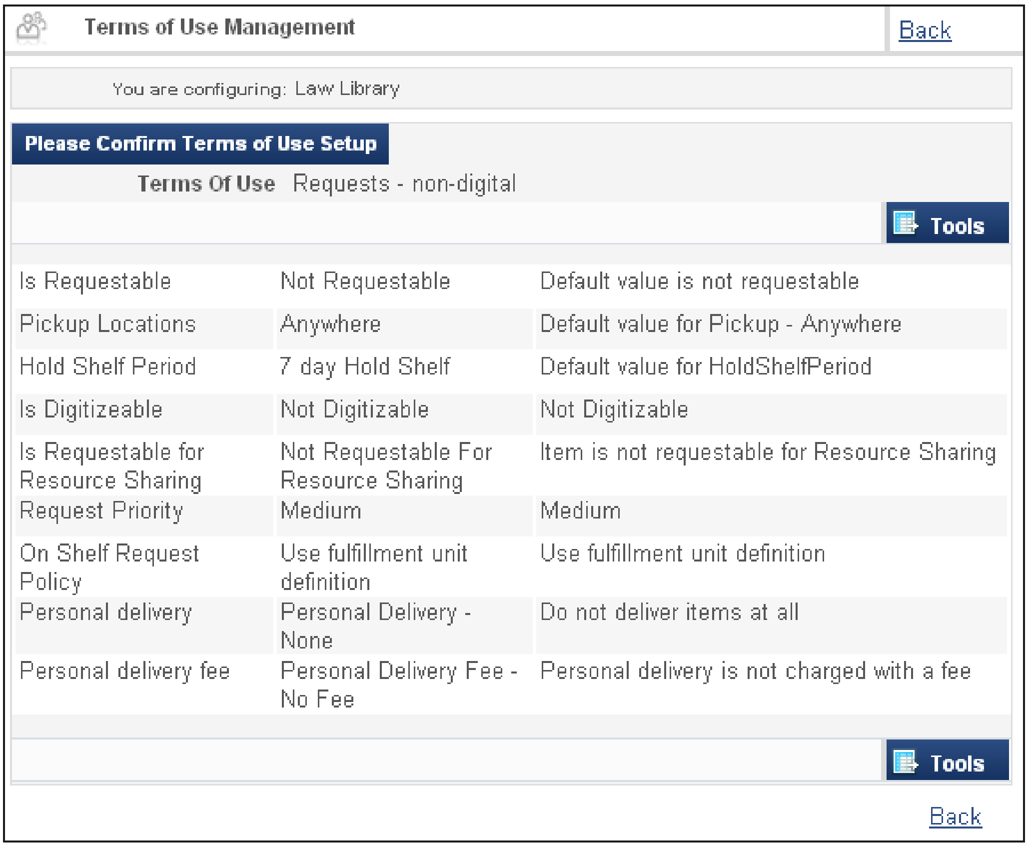


Figure 244: View Terms of Use Management Page

Click **Back** to return to the Terms of Use Management page.

To configure a TOU and attach it to a fulfillment unit to support sending resource sharing items to a patron:

1 Create a Borrowing Resource Sharing Terms of Use which supports Personal Delivery, as described in **To add a new set of terms of use:** on page 296.

2 On the Fulfillment Units List page (**Fulfillment > Physical Fulfillment > Fulfillment Units**), click the **Organization Unit List** link on the top right side of the page.

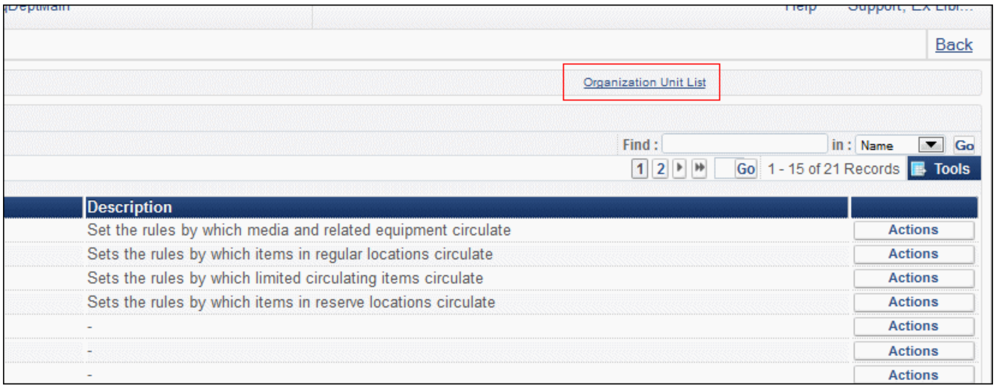


Figure 245: Organization Unit List Link

The Organization Units List page opens.

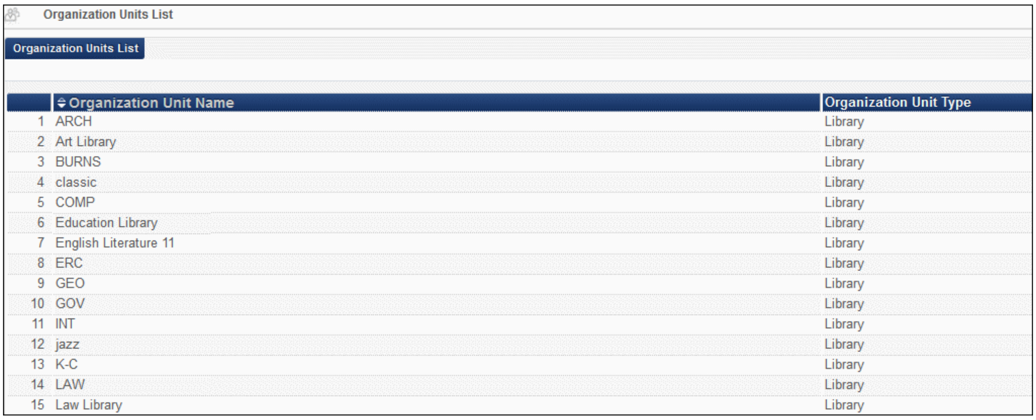


Figure 246: Organization Units List Page

3. Locate the **Resource Sharing Library** entry and click **Choose**. The Fulfillment Units List page displays the fulfillment units associated with the resource sharing library.
4. Select **Actions > Edit** for a fulfillment unit. The Edit Fulfillment Unit page opens.

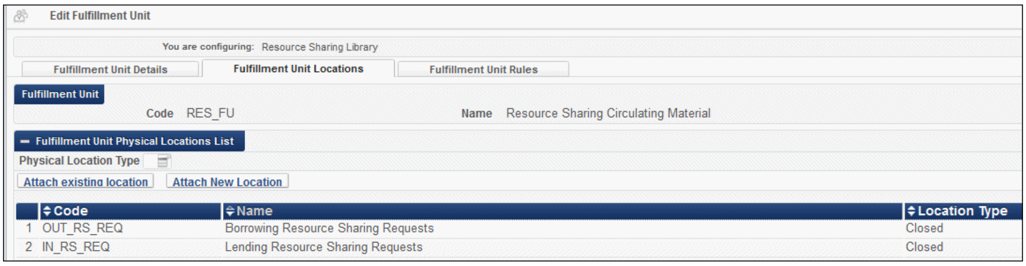


Figure 247: Edit Fulfillment Unit Page

5 Click the **Fulfillment Unit Rules** tab.

6 In the **Rule Type** field, select **Borrowing Resource Sharing** to display the resource sharing borrowing rules.

Figure 248: Edit Fulfillment Unit Page

7 Click **Add Rule**. The Fulfillment Unit Rules Editor page opens.

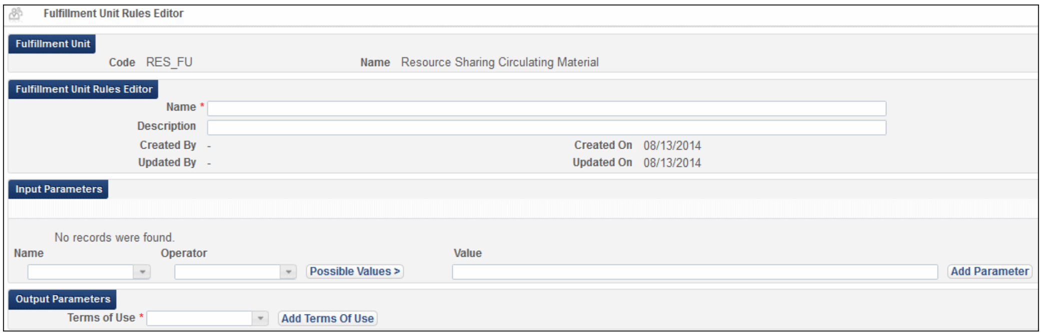


Figure 249: Fulfillment Unit Rules Editor Page

8 Configure a rule, adding the terms of use you configured in step 1 above.

9 Click **Save**. The Fulfillment Units List page displays the fulfillment unit with the updated rule.

NOTE:

For a patron to be able to request resource sharing items for pickup at a personal delivery address, the patron must have a Home or Work address defined. A patron's address type is configured on the patron's User Details page (**Administration > User Management > Find and Manage Users**). Click the Contact Information tab and add an address in the Addresses section (see **Managing Users** in the *Alma Administration Guide*).

Viewing Related Fulfillment Rules

You can view the fulfillment rules that are associated with a specific terms of use.

To view the fulfillment rules associated with a specific TOU:

1 On the Terms of Use Management Page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Terms of Use and Policies**), select **Actions > Show Related Fulfillment Rules** for a TOU. The Related Fulfillment Rules page opens.

Figure 250: Related Fulfillment Rules Page

The fulfillment rules that are using the selected terms of use display in the table.

2 Optionally, you can do the following:

- Click the link in the **Rule Name** column to open the Fulfillment Unit Rules Editor page for the selected rule.

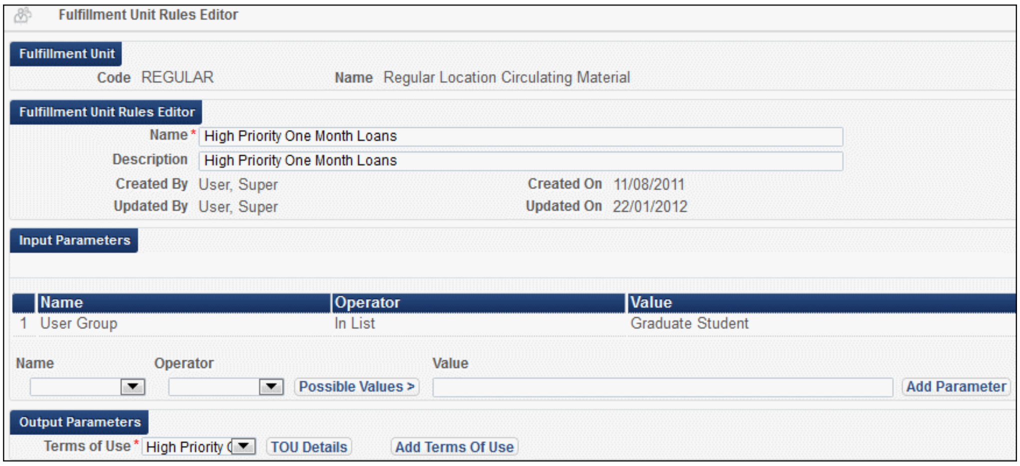


Figure 251: Fulfillment Unit Rules Editor Page

- Click the link in the **Fulfillment Unit** column to open the Edit Fulfillment Unit page for the selected fulfillment unit.

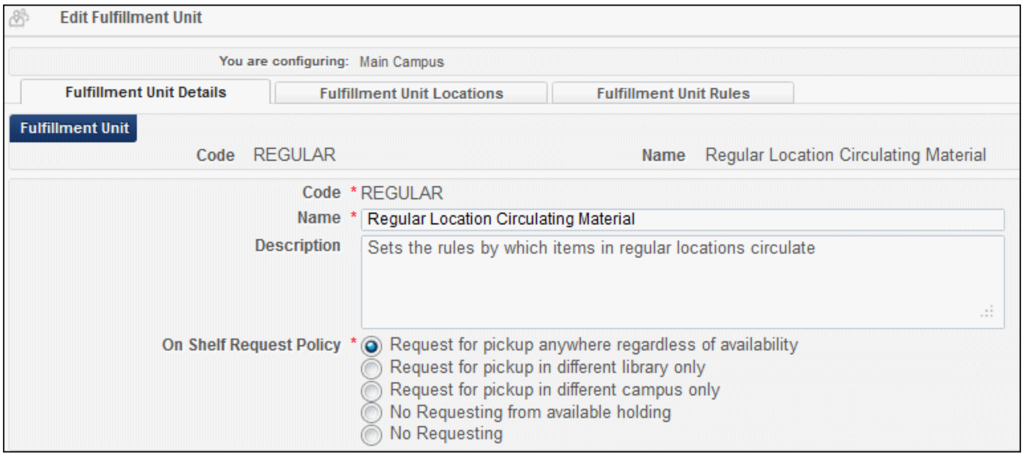


Figure 252: Edit Fulfillment Unit Page

Configuring Block Preferences

PERMISSIONS:

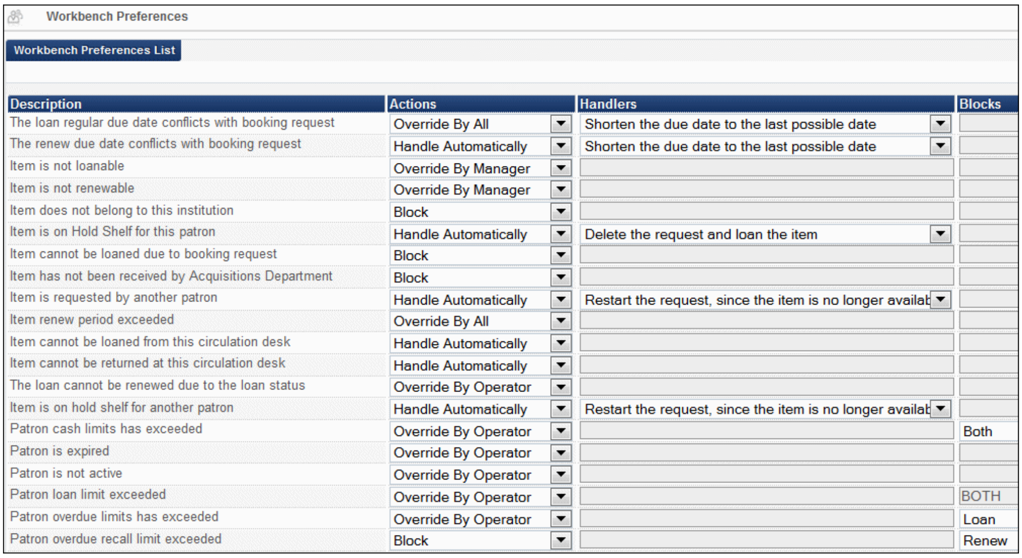
To configure block preferences, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Block preferences let you control how various scenarios are handled at circulation desks within the institution. A typical scenario may be as follows:

> A patron brings a book to a circulation desk and attempts to borrow the book. When the circulation desk operator enters the book's ID into the system, it is discovered that the book has been requested by another patron, preventing the user from borrowing it. Depending on the block preferences and the staff member's permissions, the block may be overridden.

The block preferences that are defined for the institution are displayed on the Workbench Preferences page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > 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 Manager		
Item is not renewable	Override By Manager		
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	Handle Automatically	Restart the request, since the item is no longer availat	
Item renew period exceeded	Override By All		
Item cannot be loaned from this circulation desk	Handle Automatically		
Item cannot be returned at this circulation desk	Handle Automatically		
The loan cannot be renewed due to the loan status	Override By Operator		
Item is on hold shelf for another patron	Handle Automatically	Restart the request, since the item is no longer availat	
Patron cash limits has exceeded	Override By Operator		Both
Patron is expired	Override By Operator		
Patron is not active	Override By Operator		
Patron loan limit exceeded	Override By Operator		BOTH
Patron overdue limits has exceeded	Override By Operator		Loan
Patron overdue recall limit exceeded	Block		Renew

Figure 253: Workbench Preferences Page

NOTE:

Block preferences can be configured at the institution level only. Select the required institution from the **You are configuring** filter on the Fulfillment Configuration page.

The list of block preferences is predefined. You cannot add or delete a block preference, but you can modify its settings. You set the block preferences at the institution level. The preferences that you set apply to all libraries within the institution. For details on editing block preferences, see **Editing Block Preferences**, below.

Editing Block Preferences

You can edit the details of any selected block preferences. The details that you can modify are configured with the following fields on the Workbench Preferences page:

- **Actions** – Defines the global action to perform in a given scenario
- **Handlers** – Defines the action to perform automatically when the **Action** field is set to **Handle Automatically** or one of the **Override by** options

NOTE:
A handlers can be edited only when there is more than one option to choose from for an action.

- **Blocks** – Defines which types of transactions to block (**Loan**, **Renew**, or **Both**)

The available actions are:

- **Block** – The item is blocked and the patron cannot borrow the item.
- **Override by Manager** – The block on the item can be overridden only by a staff member with the Circulation Desk Manager role at the current circulation desk.
- **Override by Operator** – The block on the item can be overridden only by a staff member with the Circulation Desk Manager or Circulation Desk Operator role at the current circulation desk.
- **Override by All** – The block on the item can be overridden by any staff member with either the Circulation Desk Manager, Circulation Desk Operator, or Circulation Desk Operator–Limited role at the current circulation desk.
- **Handle Automatically** – Indicates that specific actions are to be performed by Alma. These actions are specified in the **Handler** field, and are predefined by Ex Libris. Handler options can be configured only if you select **Handle automatically** or one of the **Override by** options.

NOTES:

- The block preferences **User does not have a patron role or the role has expired**, **Item has not been received by Acquisitions Department**, **Item cannot be loaned due to booking request**, and **Item does not belong to this institution** contain only a single Action (**Block**), which cannot be overridden.
- The block preference **Not Renewable - Item has Requests** is relevant only if **PATRON_PHYSICAL = Yes** on the Loan Recalls Mapping Table page (see **Configuring Loan Recall Requests** on page **316**).

- When working with external users, the block preference **Patron is Expired** indicates that the patron has expired in the external system, and the block preference **Patron is not Active** indicates that the patron is not active in the external system.
- When selecting **Item cannot be loaned from this circulation desk**, **Item cannot be returned at this circulation desk**, or **Not Renewable – Item has Requests**, no **Handler** options are available when **Handle automatically** is selected. In these cases, Alma ignores the block and the item is loanable.

The Workbench Preferences page contains the following similar settings:

- **The loan cannot be renewed due to the loan status** – Used when an item's status is **Lost**, **Claimed Returned**, or **Recalled**.
- **Not Renewable - Item has Request(s)** – When multiple copies of an item are checked out and a recall request recalls only one of the items, the other items that have not been recalled cannot be renewed.

To edit the details of a block preference:

1. On the Workbench Preferences page, locate the block preference that you want to edit.
2. Modify the description as required.
3. Select a different action if required. The lists of available actions are predefined, and vary from scenario to scenario. Note that many scenarios have only one handler option, **Block**.
4. Select a different handler if required. The lists of available handlers are predefined, and vary from scenario to scenario. Note that not all scenarios have handler options. A handler is displayed only if the **Handle automatically** action or one of the **Override by** actions is selected.
5. Select the type of transactions that you want to block (**Loan**, **Renew**, or **Both**). Note that many scenarios do not allow this option and blocks apply to both loans and renewals.
6. Click **Save** to store the modified block preferences in the system.

Configuring Automatic Loan Renewal Rules

PERMISSIONS:

To configure automatic loan renewal rules, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Automatic loan renewal rules define the conditions under which items will be renewed by the **Notifications - Send Courtesy Notices and Handle Loan Renewals** job. The automatic loan renewal rules operate in conjunction with the **auto_renew_loan_days** parameter and renews items that are due in the number of days configured for this parameter, which is defined in **Fulfillment >Fulfillment Configuration > Configuration Menu > General > Other Settings** (see **Configuring Other Settings** on page **406**).

The **Notifications - Send Courtesy Notices and Handle Loan Renewals** job attempts to renew loans according to the defined auto-renewal rules. Whether the loan is successfully renewed depends on additional conditions, such as the terms of use and existing recalls.

In addition, the **Notifications - Send Courtesy Notices and Handle Loan Renewals** job automatically renews loans unless the renewal is not allowed. Renewal may be prevented because of patron blocks, library policies, or if there are pending requests that may be fulfilled by the on-loan item. Loans that do not get renewed because of pending requests will automatically be renewed when the blocking requests are canceled or fulfilled by another item, if library policies and the patron status allow for the renewal to take place. If a loan was handled by this job but renewal was prevented due to one of the reasons mentioned above, it is not included in future instances of the **Notifications - Send Courtesy Notices and Handle Loan Renewals** job, unless its due date has changed.

For details on the **Notifications - Send Courtesy Notices and Handle Loan Renewals** job, see the relevant entry in the **Scheduled Jobs** table in the *Alma Administration Guide*.

You configure automatic loan renewal rules from the Automatic Loan Renewal Rules page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Auto Loan Renewal Rules**).

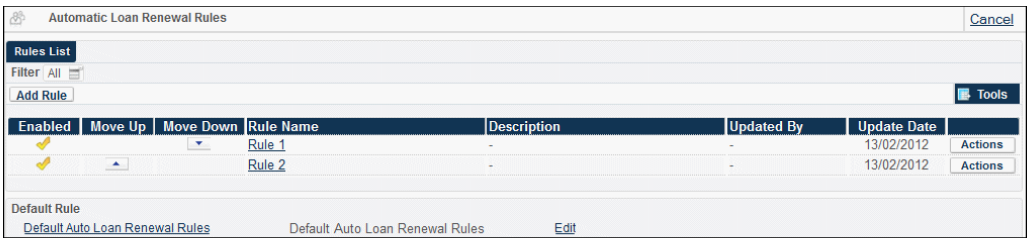


Figure 254: Automatic Loan Renewal Rules Page

NOTE:
Automatic loan renewal rules can be configured at the institution level only. Select the required institution from the **You are configuring** filter on the Fulfillment Configuration page.

The Automatic Loan Renewal Rules page displays:

- A **Filter** option, enabling you to display all the automatic loan renewal rules, the active automatic loan renewal rules, or the inactive automatic loan renewal rules.

  Click the **Filter** drop-down list and select whether to display all the automatic loan renewal rules, the active automatic loan renewal rules, or the inactive automatic loan renewal rules.
- A list of the automatic loan renewal rules that are defined for the institution.

The following actions can be performed on this page:

- Adding automatic loan renewal rules (see **Adding Automatic Loan Renewal Rules**, below)
- Editing automatic loan renewal rules (see **Editing Automatic Loan Renewal Rules** on page **310**)
- Duplicating automatic loan renewal rules (**Actions > Duplicate** and modify the relevant fields)
- Deleting automatic loan renewal rules (**Actions > Delete**)

  You cannot delete the default automatic loan renewal rule.

Adding Automatic Loan Renewal Rules

You can add new automatic loan renewal rules definitions to the institution. These are applied to all the libraries within the institution.

Alternatively, you can use the **Actions > Duplicate** option to duplicate an existing rule and then edit it (see **Editing Automatic Loan Renewal Rules** on page **310**).

To add a new automatic loan renewal rule:

1 On the Automatic Loan Renewal Rules page, click the **Add Rule** button. The Automatic Rule Loan Renewal page opens.

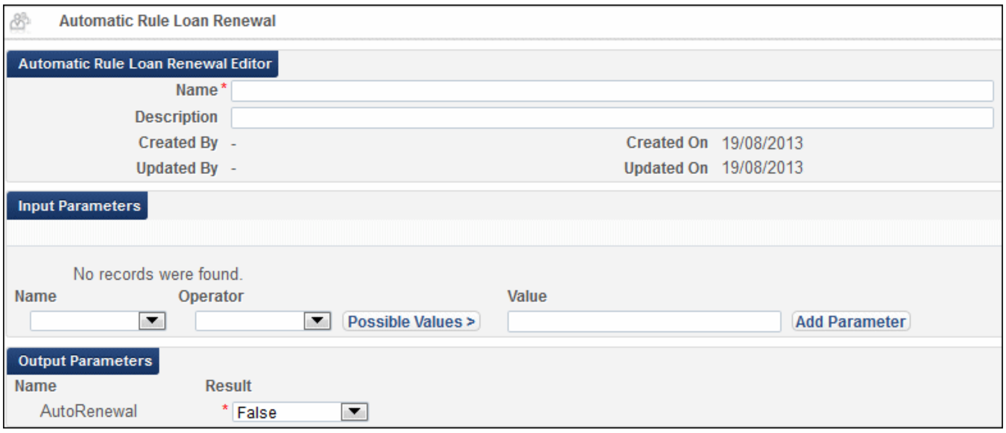


Figure 255: Automatic Rule Loan Renewal Page

2 Enter a name (required) and a description (optional) for the new rule.

3 In the **Input Parameters** section, specify the components of the input parameter (**Item owner** = library of the item which is loaned; **User group** = user group of the patron who has the item on loan), and select the required **Operator**. A set of input parameters may look like this: *Item owner = Art Library; User group = Graduate student*. In this case, the auto renewal rule would apply only for Art Library items on loan to graduate students.

4 Click the **Add Parameter** button. The set of input parameters is added to the list of parameters for the automatic loan renewal rule.

5 Repeat the previous two steps to add all the required parameters for the rule.

NOTE:
All the input parameters must be fulfilled for the rule to be applied. If they are not, the default rule is applied.

6 Under **Output Parameters**, select whether auto renewal will be applied (**True**) or will not be applied (**False**).

7 Click **Save** to store the new rule.

8 If you have defined more than one rule, on the Automatic Loan Renewal Rules page, use the **Move Up** and **Move Down** arrows to set the order of the rules. The order of the rules is relevant in that the system applies the first (and only the first) appropriate, enabled rule. If no appropriate rule is found, the system uses the default rule.

NOTE:
You can click the gray/yellow check mark to the left of the rule to enable/ disable it.

Editing Automatic Loan Renewal Rules

You can edit the default automatic loan renewal rule, or an automatic loan renewal rule that you added.

To edit an automatic loan renewal rule:

1 On the Automatic Loan Renewal Rules page, select **Actions > Edit** for the specific rule you want to edit, or click the **Edit** link under **Default Rule** to edit the default automatic loan renewal rule. The Automatic Rule Loan Renewal page opens.

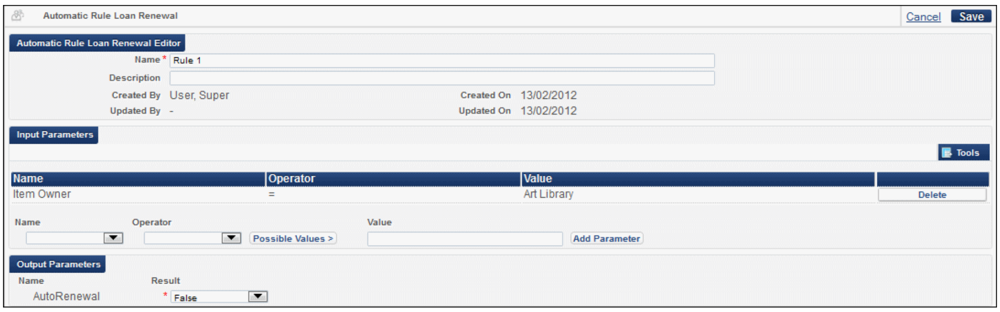


Figure 256: Edit Automatic Rule Loan Renewal Page

2 Modify the rule name and description as required.

NOTES:

- You cannot edit an existing set of input parameters. To modify an existing set of input parameters, first delete the existing set, and then add a new set.
- You cannot delete or add a new set of input parameters for the default automatic loan renewal rule.

3 Click **Delete** for a set of input parameters.

4 Add a new set of input parameters as described in **Adding Automatic Loan Renewal Rules** on page 308.

5 Under **Output Parameters**, select whether auto renewal should (**True**) or should not (**False**) be applied.

6 Click **Save** to store your changes to the automatic loan renewal rule.

The default rule has no configuration parameters and can only be activated (**True**) or deactivated (**False**), as follows:

- **True** – Indicates that if no auto renewal rule is met, the invoice is still sent for renewal.
- **False** – Indicates that if no auto renewal rule is met, the invoice is not sent for renewal.

Configuring Overdue and Lost Loan Profiles

PERMISSIONS:

To configure overdue and lost loan profiles, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can configure profiles that contain the criteria according to which you can:

- send a warning to a patron that they have an overdue loan
- mark overdue loans as lost

Alma runs a daily batch job facility for processing overdue and lost loans, which determines the loans for which warnings are sent and those that are defined as lost.

You configure overdue and lost loan profiles on the Overdue and Lost Loan Profile List page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Overdue and Lost Loan Profile**).

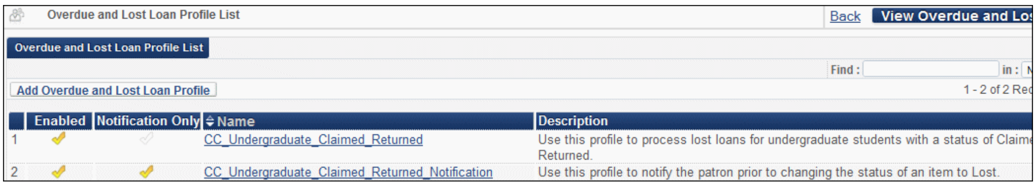


Figure 257: Overdue and Lost Loan Profile List Page

NOTE:

Overdue and lost loan profiles can be configured at the institution level only.

The Overdue and Lost Loan Profile List page displays the following:

- A **Find** option. Note the option to search overdue and lost loan profiles by either of the **in** drop-down options – **Description** or **Name**.
- A list of overdue and lost loan profiles

Click the overdue and lost loan profile **Name** heading to sort the list alphabetically, in ascending or descending order.

The following actions can be performed on this page:

- Adding an Overdue and Lost Loan Profile (see **Adding an Overude and Lost Loan Profile**, below)
- Editing an Overdue and Lost Loan Profile (**Actions > Edit**)
- Duplicating an Overdue and Lost Loan Profile (**Actions > Duplicate** and modify the relevant fields)
- Deleting an Overdue and Lost Loan Profile (**Actions > Delete**)
- Running an Overdue and Lost Loan Profile (**Actions > Run now**)
- Adding an Overdue and Lost Loan Notification Profile (see **Adding an Overdue and Lost Loan Notification** on page 314)

Adding an Overude and Lost Loan Profile

You can add an overdue and lost loan profile to an institution. This profile determines the criteria by which loans are considered lost. For these loans, Alma changes the status to **Lost**, creates the relevant fines and fees, and sends an invoice to the borrowing patron.

To add an overdue and lost loan profile:

1. On the Overdue and Lost Loan Profile List page, click the **Add Overdue and Lost Loan Profile** button. The Overdue and Lost Loan Profile Record page opens.

NOTE:
If you want to create a copy of an existing overdue and lost loan profile, select **Actions > Duplicate**. Once you have copied the profile, you can modify it as needed.

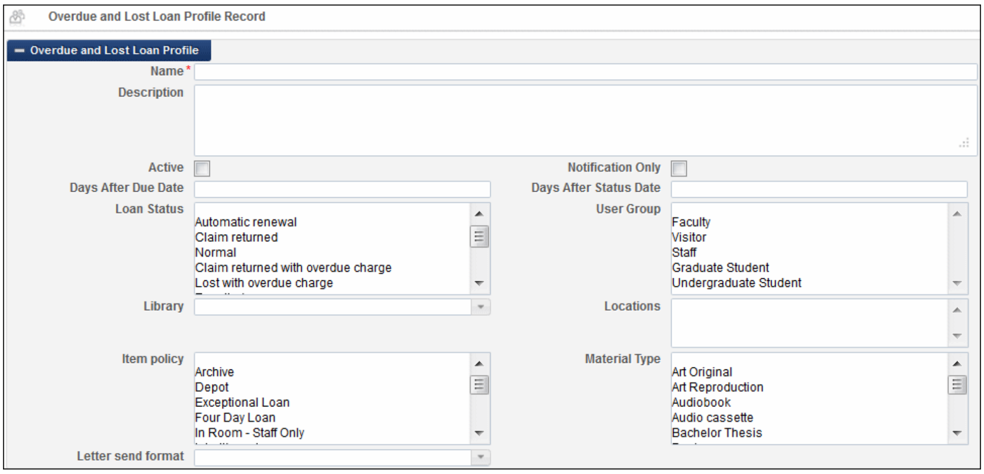


Figure 258: Overdue and Lost Loan Profile Record Page

2 Enter the profile name and a description of the profile (if desired), and specify the criteria by which an overdue loan is to be considered a lost loan. Note that if you do not select specific statuses, user groups, libraries, locations, item policies, and/or material types, the profile will apply to all of the above in the system.

NOTES:

- You can select multiple, predefined options for **Loan status**, **User group**, **Item policy**, and **Material type** using the CTRL key. These options are governed by a Boolean OR operator.
- A loan that meets all the conditions specified in the profile is considered a lost loan (that is, a Boolean AND operator operates between fields).
- The **Library** field pertains to the item's current location. If the item is in a temporary location, this is the temporary location. If the item is not in a temporary location, this is the permanent location.

3 In the **Days after due date** field, indicate the number of days after the due date upon which the item is considered lost.

For example, if an item's due date is March 1 and **Days after due date = 14**, the item is considered lost on March 15.

4 In the **Days after status date** field, indicate the number of days after an update to the value of the **Loan status** field upon which the item is considered lost.

For example, if an item's loan status is updated on April 1 and **Days after status date = 10**, the item is considered lost on April 11.

NOTE:
The value of this field also applies to migrated loans, according to the loan's creation date.

5 To enable the profile, select the **Active** check box. The lost loan batch job relates only to profiles that are active. Note that you may later disable/ enable the profile by clicking the check mark in the **Enabled** column on the Overdue and Lost Loan Profile List page.

NOTE:
If an Overdue and Lost Loan profile is not enabled, you can still run it by selecting **Actions > Run Now**.

6 When you have defined all the criteria for the profile, click **Save**.

Adding an Overdue and Lost Loan Notification

You can add an overdue and lost loan warning profile to an institution. This profile determines the criteria by which the system sends overdue warnings for loans. The warnings do not affect the loan status or create any fines or fees but rather, they inform the patron of the number of days upon which the loan is considered lost.

NOTE:
For any given loan, Alma applies an overdue and lost loan notification only once. You cannot configure recurring notifications at various intervals (such as 7, 14, or 21 days after the due date).

To add an overdue and lost loan notification profile:

1. On the Overdue and Lost Loan Profile List page, select **Actions > Duplicate** for a lost loan profile. The Lost Loan Profile Record page opens, displaying the parameters of the specified lost loan profile.

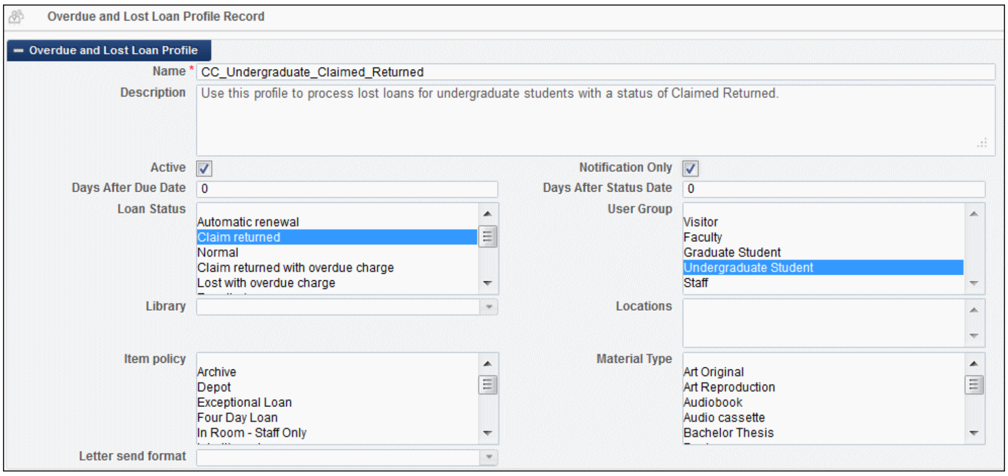


Figure 259: Lost Loan Profile Record Page

2. Select the **Notification Only** check box to indicate that the profile is to provide a warning for a loan with the specified parameters.
3. Modify the **Name** and **Description** fields to indicate that the profile is for a warning notification.
4. Modify the **Days after due date** field to indicate the number of days after the due date upon which the warning notification message is to be sent.

   For example, if an item's due date is March 1 and **Days after due date = 5**, the warning message is sent on March 6.
5. In the **Days after status date** field, indicate the number of days upon which a warning notification is sent after a status change takes place, such as when a loan is recalled or is claimed to be returned.

   For example, if an item's status is updated on April 1 and **Days after status date = 7**, the warning message is sent on April 8.
6. Click **Save**. The Overdue and Lost Loan Notification Profile is displayed on the Overdue and Lost Loan Profile page with a yellow check mark in the **Notification Only** column.

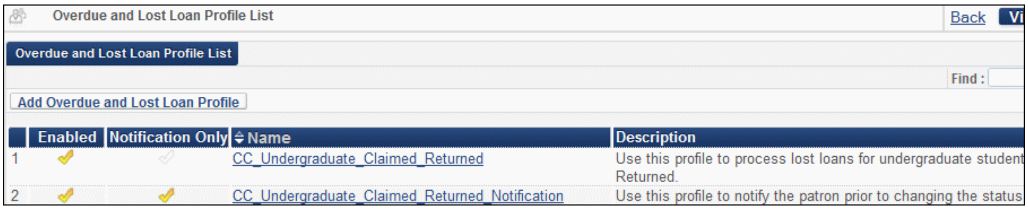


Figure 260: Overdue and Lost Loan Notification Profile

You can disable the notification profile by clicking the yellow check mark in the **Notification Only** column.

NOTE:

Alternatively, you can create an Overdue and Lost Loan notification profile by creating a new lost loan profile (as described in **To add an overdue and lost loan profile:** on page **312**), selecting the **Notification Only** check box, and entering a value in the **Days after status date** field to indicate the number of days upon which a warning notification is sent after a status change takes place.

For details on configuring the Overdue and Lost Loan Notification letter that is sent to patrons, see **Configuring Alma Letters** in the *Alma Administration Guide*.

Configuring Loan Recall Requests

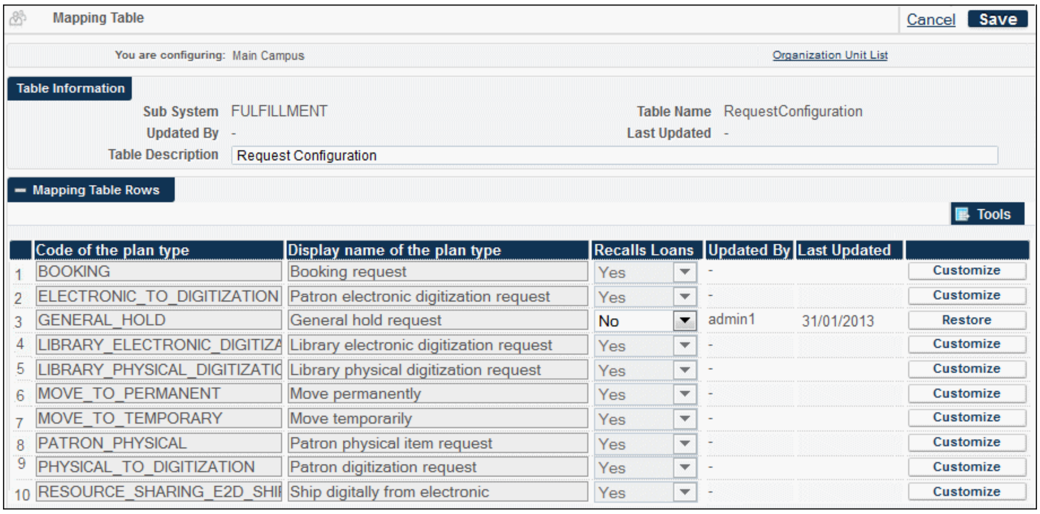
PERMISSIONS:

To configure loan recall requests, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can configure Alma to send or not send a loan recall request during system actions. By default, recall requests are enabled for all actions.

You configure loan recall requests on the Mapping Table page for loan recalls (**Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Loan Recalls Configuration**).



	Code of the plan type	Display name of the plan type	Recalls Loans	Updated By	Last Updated	
1	BOOKING	Booking request	Yes	-		Customize
2	ELECTRONIC_TO_DIGITIZATION	Patron electronic digitization request	Yes	-		Customize
3	GENERAL_HOLD	General hold request	No	admin1	31/01/2013	Restore
4	LIBRARY_ELECTRONIC_DIGITIZA	Library electronic digitization request	Yes	-		Customize
5	LIBRARY_PHYSICAL_DIGITIZATIC	Library physical digitization request	Yes	-		Customize
6	MOVE_TO_PERMANENT	Move permanently	Yes	-		Customize
7	MOVE_TO_TEMPORARY	Move temporarily	Yes	-		Customize
8	PATRON_PHYSICAL	Patron physical item request	Yes	-		Customize
9	PHYSICAL_TO_DIGITIZATION	Patron digitization request	Yes	-		Customize
10	RESOURCE_SHARING_E2D_SHII	Ship digitally from electronic	Yes	-		Customize

Figure 261: Loan Recall Request Mapping Table

NOTES:

- If the **Recalls Loans** value is set as **No** in this table for the PATRON_PHYSICAL type of request and the applicable loan TOU has **Is Recallable** defined as **Yes**, the loan will not be recalled. Only if **Recalls Loans = Yes** is the TOU policy applied.
- If **PATRON_PHYSICAL = YES** and the TOU fulfillment policy is **No Recall**, items are marked as **Recalled**, to prevent renewals.
- Loan recall requests can be configured at the institution level only. Select the required institution from the **You are configuring** filter on the Fulfillment Configuration page.

To configure loan recall requests:

1. On the Mapping Table page for loan recalls (**Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Loan Recalls Configuration**), click **Customize** for the relevant action. The **Customize** button is changed to **Restore**, and the **Recalls Loans** column is enabled for editing.
2. Select **No** in the Recalls Loans column to disable loan recall requests for the specified action.
3. Click **Save**. Loan recall requests are not sent during the specified action.

   To enable loan recall requests for an action, click **Restore**.

Configuring Request Task Names

PERMISSIONS:

To configure request task names, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can customize the names of request statuses in the Code Table for Request Step Statuses (**Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Request Task Name**).

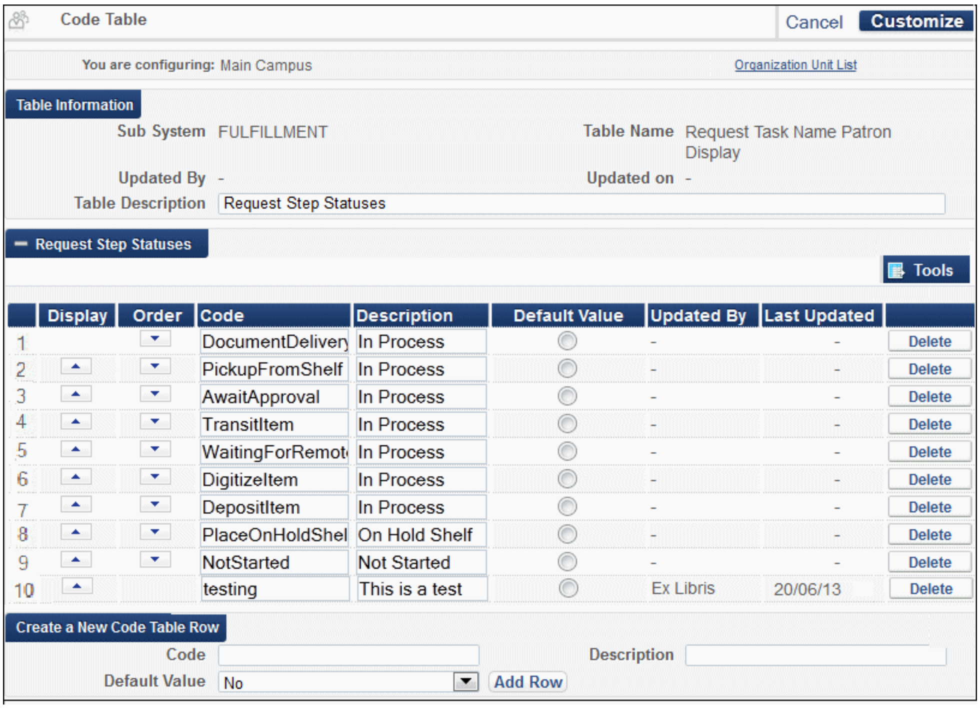


Figure 262: Code Table – Request Step Statuses

NOTE:

Request statuses can be configured at the institution level only. Select the required institution from the **You are configuring** filter on the Fulfillment Configuration page.

To customize request task names:

1 On the Code Table page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Request**

Task Name), modify the values in the **Code** and **Description** fields for the relevant status in the Request Step Statuses table.

2. To add a status, add the desired values in the **Create a New Code Table Row** section in the **Code** and **Description** fields and click **Add Row**. The new status is displayed at the bottom of the Request Step Statuses table. Use the **Move Up** and **Move Down** arrows to set the order of the status names.
3. Click **Save**.

Patron Configurations

Configuring Patron (User) Groups

PERMISSIONS:

To configure patron (user) groups, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You configure patron (user) groups on the User Groups Code Table page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Patron Configurations > Patron Groups**).

For details, see **Configuring User Groups** in the *Alma Administration Guide*.

Configuring Patron Limits

PERMISSIONS:

To configure patron limits, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

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. For example, you can specify that the patron's account is blocked when the patron reaches 10 overdue items. The patron will not be able to borrow additional resources from the library until the block is removed.

Patron limits are defined for groups of patrons, based on the user groups to which the patrons are assigned. For example, you could define a set of limits for all patrons that are part of the **Graduate Student** user group. For each user group, you can define limits that may block a patron's account, such as:

- Maximum number of overdue items
- Maximum amount of cash that can be owed by the patron
- Maximum number of bookings (not including resource sharing requests)
- Maximum number of overdue recalled items

These limits are configured at the institution level via the Patron Limits Definitions mapping table. Each set of limits can be either enabled or disabled. By default, each new set of patron limits is enabled. The limits that you define apply to all libraries within the institution.

Patron limits are configured on the Patron Limits Definitions Mapping Table (**Fulfillment > Fulfillment Configuration > Configuration Menu > Patron Configurations > Patron Limits**).

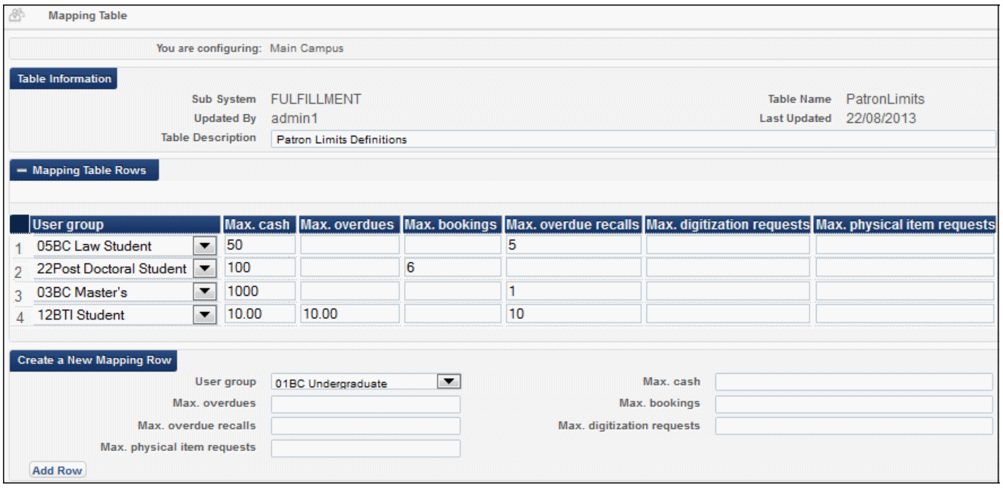


Figure 263: Patron Limits Definitions – Mapping Table

NOTE:

Patron limits can be configured at the institution level only. Select the required institution from the **You are configuring** filter on the Fulfillment Configuration page.

The Patron Limits Definitions Mapping Table displays:

- Mapping table rows – Each row defines the patron limits for a patron group at the institution level
- Create New Mapping Row section – A group of input fields that enable you to define and create a new set of patron limits for a patron group

The following actions can be performed on this page:

- Adding a set of patron limits (see **Adding a Set of Patron Limits**, below)
- Editing a set of patron limits (see **Editing a Set of Patron Limits** on page 322)
- Deleting a set of patron limits (click **Delete**)

Adding a Set of Patron Limits

You can add a new set of patron limits to the institution. When you add a set of patron limits for a specific user group (for example, **Alumni**), ensure that there is only one enabled set of limits for this user group.

You define patron limits at the institution level. The limits that you define apply to all libraries within the institution.

To add a new set of patron limits:

1. On the Mapping Table page, in the **Create a New Mapping Row** section, select the patron user group for which you want to create a new set of limits.

Figure 264: Create New Mapping Row Section - Patron Limits

2. Enter the following information:
   - **Max. overdues** – Maximum number of overdue items allowed before the patron's account is blocked
   - **Max. cash** – Maximum amount of cash that can be owed by the patron before the patron's account is blocked
   - **Max. bookings** – Maximum number of bookings allowed before the patron's account is blocked. This value does not include resource sharing requests.
   - **Max. overdue recalls** – Maximum number of overdue recalled items allowed before the patron's account is blocked
   - **Max. digitization requests** – Maximum number of digital item hold requests allowed before the patron's account is blocked

- **Max. physical item requests** – Maximum number of concurrent active physical item hold requests allowed before the patron's account is blocked

NOTE:
If you leave one of the above boxes blank, no limit will be applied in this area.

3. Click the **Add Row** button. The new set of limits is displayed at the bottom of the list of defined patron limits.
4. Click **Save** to store the new set of patron limits.

Editing a Set of Patron Limits

You can edit the details of any set of patron limits.

To edit patron limit details:

1. On the Mapping Table page, under **Mapping Table Rows**, locate the set of limits that you want to edit.
2. Modify the specific limit, as required.
3. Click **Save** to store the modified patron limits in the system.

Configuring Loan Limit Rules

PERMISSIONS:

To configure loan limit rules, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can limit the number of concurrent loans that a user may have by creating a loan limit rule. The rule can be applied according to library, location, material type, and user group.

You configure loan limit rules from the Loan Limit Rule page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Patron Configurations > Loan Limits**).

Figure 265: Loan Limit Rules Page

NOTE:

Loan limit rules can be configured at the institution level only. Select the required institution from the **You are configuring** filter on the Fulfillment Configuration page.

On the Loan Limit Rules page, the following is displayed:

- a **Filter** option, enabling you to display all of the loan limit rules, the active loan limit rules, or the inactive loan limit rules
- a list of loan limit rules

The following actions can be performed on this page:

- Adding Loan Limit Rules (see **Adding Loan Limit Rules**, below)
- Editing Loan Limit Rules (see **Editing a Loan Limit Rule** on page 325)
- Duplicating Loan Limit Rules (**Actions > Duplicate** and modify the relevant fields)
- Deleting Loan Limit Rules (**Actions > Delete**)

Adding Loan Limit Rules

You can add a loan limit rule. The rules that you define apply to all the libraries within the institution.

To add a loan limit rule:

1 On the Loan Limit Rules page, click the **Add Rule** button. The Loan Limit page opens.

NOTE:
If you want to create a copy of an existing loan limit rule, select **Actions > Duplicate**. Once you have copied the loan limit rule, you can modify it as needed.

Figure 266: Loan Limit Page

2 Under **Input Parameters**, enter a name and description of the loan limit rule.

3 Under **Input Parameters**, specify the components of the input parameter (**Name**, **Operator**, and **Value**). A set of input parameters may look like this: *Library=ArtLibrary*.

4 Click **Add Parameter**. The set of input parameters is added to the list of parameters for the loan limits rule.

5 Repeat the previous two steps to add all of the required parameters for the rule.

NOTE:
All the input parameters must be fulfilled for the rule to be applied.

6 Under **Output Parameters**, enter a loan limit – the maximum number of items that a patron can borrow according to the loan limit rule.

7 Click **Save** to store the new rule.

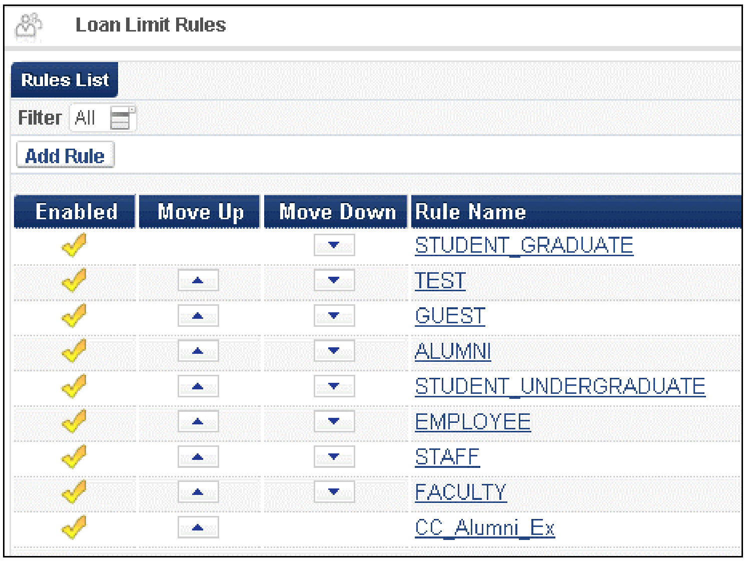


Figure 267: Loan Limit Rules Page

NOTES:

- The order of the rules is not important. All the rules that match the criteria are checked by the system. If a limit defined by any of the rules is exceeded, the new loan is not created.
- You can click the gray/yellow check mark to the left of the rule to enable/disable it.

Editing a Loan Limit Rule

You can edit loan limit rules.

To edit a loan limit rule:

1. On the Loan Limit Rules page, select **Actions > Edit** for the specific rule you want to edit. The Loan Limit page opens.

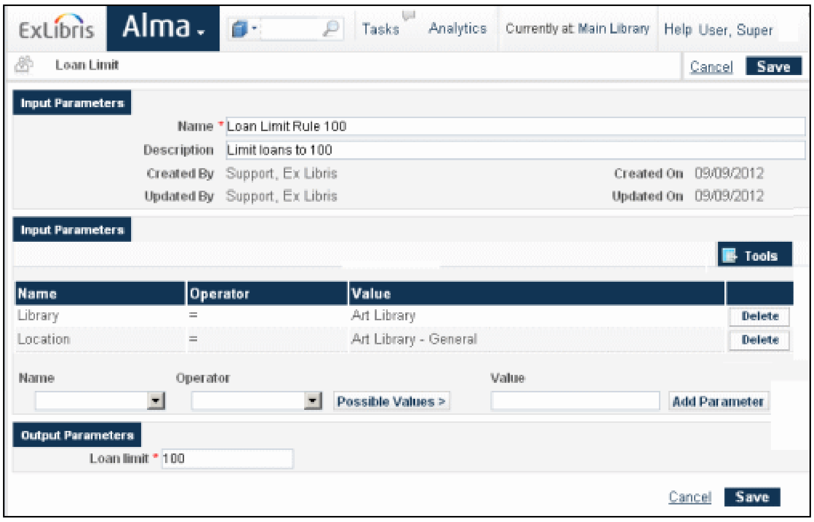


Figure 268: Edit Loan Limit Rule Page

2. Modify the rule name and description as required.

NOTE:
You cannot edit an existing set of input parameters. To modify an existing set of input parameters, first delete the existing set, and then add a new set.

3. Click **Delete** for the specific set of input parameters record you want to delete.
4. Add a new set of input parameters as described in **Adding Loan Limit Rules** on page **323**.
5. Under **Output Parameters**, enter a loan limit – the maximum number of items that a patron can borrow according to the loan limit rule.
6. Click **Save** to store your changes to the loan limit rule.

Configuring User Block Definitions

Patron-specific blocks are standard patron blocks that can be assigned in a patron record. For details on assigning user blocks to a user, see **Working With Blocks** in the *Alma Administration Guide*.

You configure user block definitions on the User Blocks Definitions Mapping Table page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Patron Configurations > User Block Definitions**).

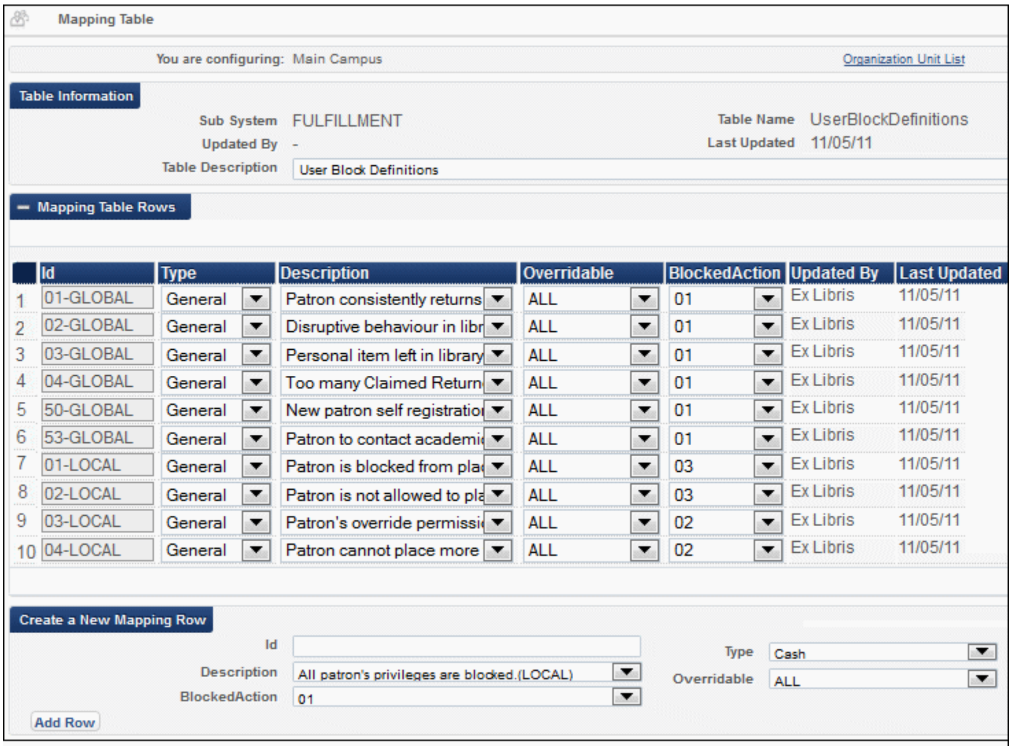


Figure 269: Mapping Table Page – User Block Definitions

NOTE:

Patron-specific blocks can be configured at the institution level only. Select the required institution from the **You are configuring** filter on the Fulfillment Configuration page.

The Mapping Table page displays:

- details about the table that contains the user block definitions for the institution. Most of the details are system-generated and cannot be edited.
- a list of the user block definitions that are defined for the institution
- a group of input fields that enable you to define and create a new set of user block definitions

The following actions can be performed on this page:

- Adding a set of user block definitions (see **Adding a Set of User Block Definitions**, below)
- Editing a set of user block definitions (see **Editing a Set of User Block Definitions** on page **329**)
- Deleting a set of user block definitions (click **Delete**)

Adding a Set of User Block Definitions

You can add a new set of user block definitions to the institution. The user block definitions that you define apply to all libraries within the institution.

To add a new user block definition:

1 On the Mapping Table page in the **Create a New Mapping Row** section, enter the ID for the new user block definition in the **Id** field.

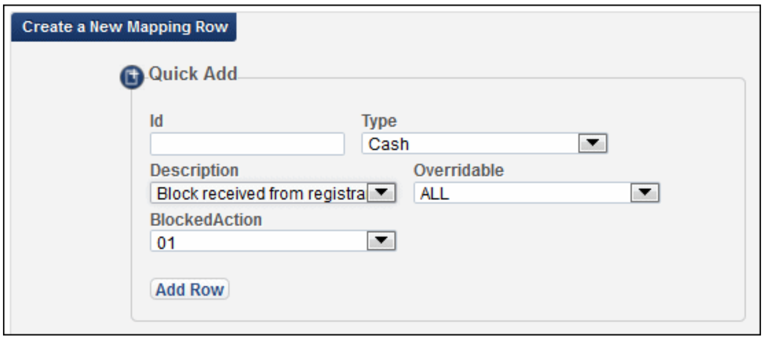


Figure 270: Create New Mapping Row Section of the Mapping Table Page

2 Select the following information from the respective drop-down lists:

- **Description** – Describes the block action; the reason for the block.
- **Blocked action** – Select the blocked action from one of the following:
  - 01 – Blocks only a loan
  - 02 – Blocks a loan and a renewal
  - 03 – Blocks loans, renewals, and hold requests

NOTE:
These blocked actions are preconfigured in Alma. To configure additional blocked actions, contact Ex Libris Support.

- **Type** – Select the type of block from one of the following:
  - Cash
  - Demerit
  - General
  - Loan
  - Resource sharing requests
  - User

NOTE:

The **Type** value is for information only and does not impact the system, with the exception of the **Demerit** type. For information on configuring demerits, see **Configuring Demerits** on page **330**.

- **Overridable** – Select whether the block is overridable from one of the following:
  - ALL – The block is overridable by any circulation desk operator
  - NONE – The block is not overridable
  - CIRCDESC – The block is overridable only by a circulation desk manager
  - OPERATOR – The block is overridable by a circulation desk manager or a circulation desk operator (and not a user with circulation desk operator – limited permissions)

3 Click the **Add Row** button. The new user block definition is displayed at the bottom of the list of defined user block definitions.

4 Click **Save** to store the new set of user block definition.

Editing a Set of User Block Definitions

You can edit the details of any user block definition. The details that you can modify are described in **Adding a Set of User Block Definitions** on page **328**.

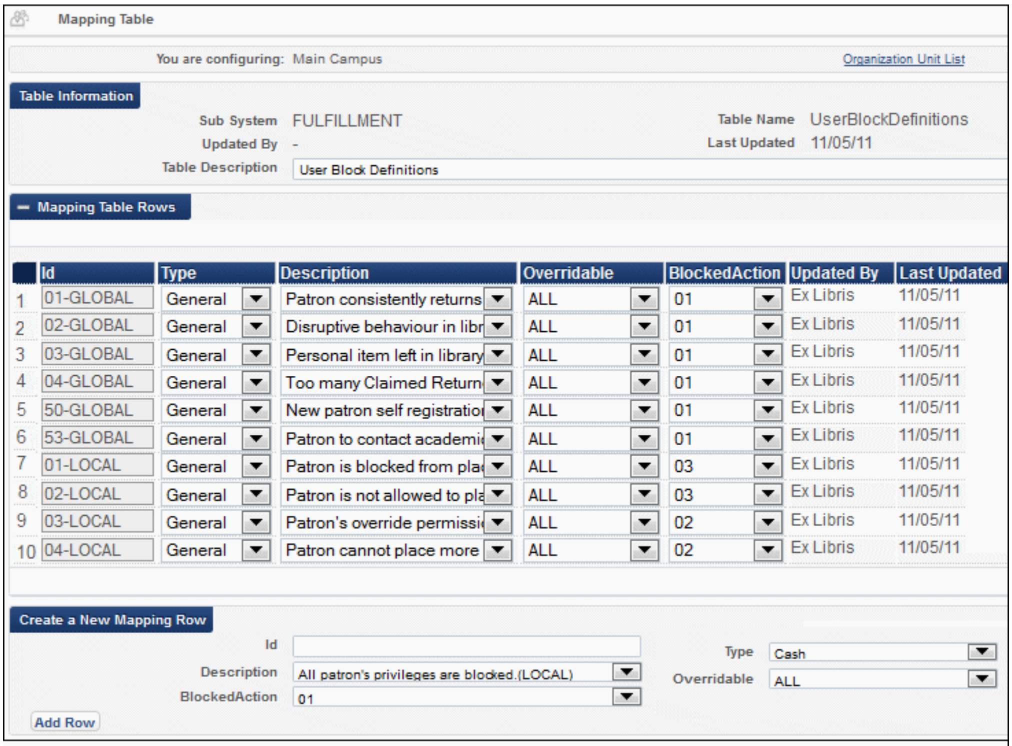
You cannot change the ID that is defined for a user group definition.

To edit user block definition details:

1 On the Mapping Table page, under **Mapping Table Rows**, locate the user block definition that you want to edit.

2 Modify the specific items as required.

3 Click **Save** to store the modified user block definitions in the system.



	Id	Type	Description	Overridable	BlockedAction	Updated By	Last Updated
1	01-GLOBAL	General	Patron consistently returns	ALL	01	Ex Libris	11/05/11
2	02-GLOBAL	General	Disruptive behaviour in libr	ALL	01	Ex Libris	11/05/11
3	03-GLOBAL	General	Personal item left in library	ALL	01	Ex Libris	11/05/11
4	04-GLOBAL	General	Too many Claimed Return	ALL	01	Ex Libris	11/05/11
5	50-GLOBAL	General	New patron self registratio	ALL	01	Ex Libris	11/05/11
6	53-GLOBAL	General	Patron to contact academi	ALL	01	Ex Libris	11/05/11
7	01-LOCAL	General	Patron is blocked from pla	ALL	03	Ex Libris	11/05/11
8	02-LOCAL	General	Patron is not allowed to pla	ALL	03	Ex Libris	11/05/11
9	03-LOCAL	General	Patron's override permissi	ALL	02	Ex Libris	11/05/11
10	04-LOCAL	General	Patron cannot place more	ALL	02	Ex Libris	11/05/11

Figure 271: Mapping Table Page – User Block Definitions

Configuring Demerits

PERMISSIONS:

To configure demerits, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Alma allows you to configure a demerit system that applies patron blocks (such as for loans) based on the number of demerits a user has accrued within a configured amount of time. Once a block is applied, the institution suspends the user for the configured number of days and subtracts the used demerit points from the user's record. If the user receives more demerit points while on suspension, these points and the user's remaining points may contribute to another suspension once the previous suspension period ends.

NOTE:

Accrued demerit points must occur within the configured number of days to receive a suspension.

The **Users - Remove Demerits Blocks** job runs daily to remove demerit blocks from user records.

For configuration information, refer to the following sections:

- **Enabling the Demerit System** on page **331**
- **Configuring Demerit Points** on page **331**
- **Configuring the Demerit Block** on page **333**
- **Monitoring the Demerit Job** on page **335**

VIDEO:
Learn about demerits in the *Demerits* video (25:05 mins). For a detailed Ask the Expert session on configuring demerits, see *Demerits in Fulfillment*.

Enabling the Demerit System

The CustomerParameters mapping table allows you to enable demerit functionality and configure demerit thresholds.

To enable the demerit functionality:

1. On the Fulfillment Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu**), click **Other Settings** under **General**. The CustomerParameters mapping table opens.
2. In the Mapping Table Rows section, customize the following fields:
   - **demerit_enable** – Set this field to **true** to enable demerit functionality.
   - **demerit_history_days** – Specify the length of the demerit tracking period in days. If the user's demerit points exceed the value specified in the **demerit_maximum_threshold** parameter during the demerit tracking period (that is the last number of days specified by this parameter), the system places a block on the user.
   - **demerit_maximum_threshold** – Specify the maximum number of points allowed during the tracking period.
   - **demerit_suspension_days** – Specify the length of a user's suspension period in days.
3. Click **Save**.

Configuring Demerit Points

The DemeritsPoints mapping table defines the demerit points given to a type of user and returned material type. You can also apply different points to overdue materials that have been recalled.

To configure demerit points:

1 On the Fulfillment Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu**), click **User Demerits** under **Patron Configuration**. The DemeritPoints mapping table page opens.

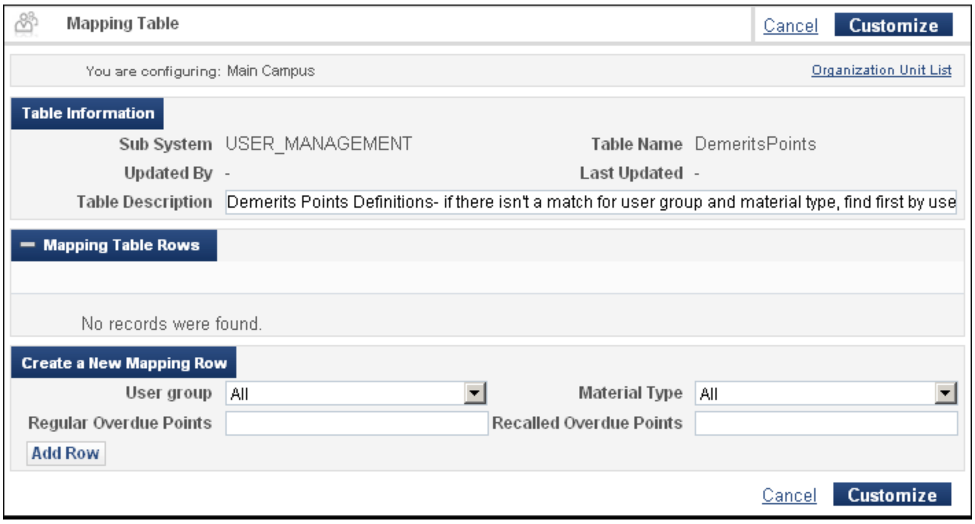


Figure 272: DemeritPoints Mapping Table

2 In the **Create a New Mapping Row** section, enter the following fields to define the points assigned to a user group and material type:

- **User group** – Select a specific user group or **All**.
- **Material Type** – Select a specific material type or **All**.
- **Regular Overdue Points** – Enter the number of demerit points to apply to overdue items (not recalled overdue items).
- **Recalled Overdue Points** – Enter the number of demerit points to apply to recalled overdue items.

3 Click **Add Row**.

Alma uses the following priority to decide which mapping row to use when assigning demerit points to a user:

a Both the user's group and the material being returned match the values in the table.

b The user's group matches the value in the table and the **Material Type** is set to **All** in the table.

c The returned item matches the **Material Type** value in the table and **User Group** is set to **All** in the table.

d Both **User Group** and **Material Type** are set to **ALL** in the table.

e If no match is found, no demerits are assigned.

For example, if the following demerit rows are defined and an alumnus returns a non-recalled manuscript late, the system assigns one demerit point to the alumnus:

Table 27. Example Demerit Point Mapping Rows

User Group	Material Type	Regular Overdue Points	Recalled Overdue Points
Undergrad	Book	3	5
All	Manuscript	3	6
Alumni	**All**	**1**	**2**

4 After you have added all of your demerit point definitions, click **Customize** to save your changes to the table.

If a user reaches the demerit threshold, the system applies a **Demerit** block on the patron record.

Configuring the Demerit Block

The UserBlockDefinitions mapping table defines the demerit block given to users that have reached the demerit point threshold during the number of consecutive days defined by the demerit history threshold.

For more information, see **Configuring User Block Definitions** on page **326**.

To configure the demerit block:

1 On the Fulfillment Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu**), click **User Block Definitions** under **Patron Configuration**. The **UserBlockDefinitions** mapping table opens.

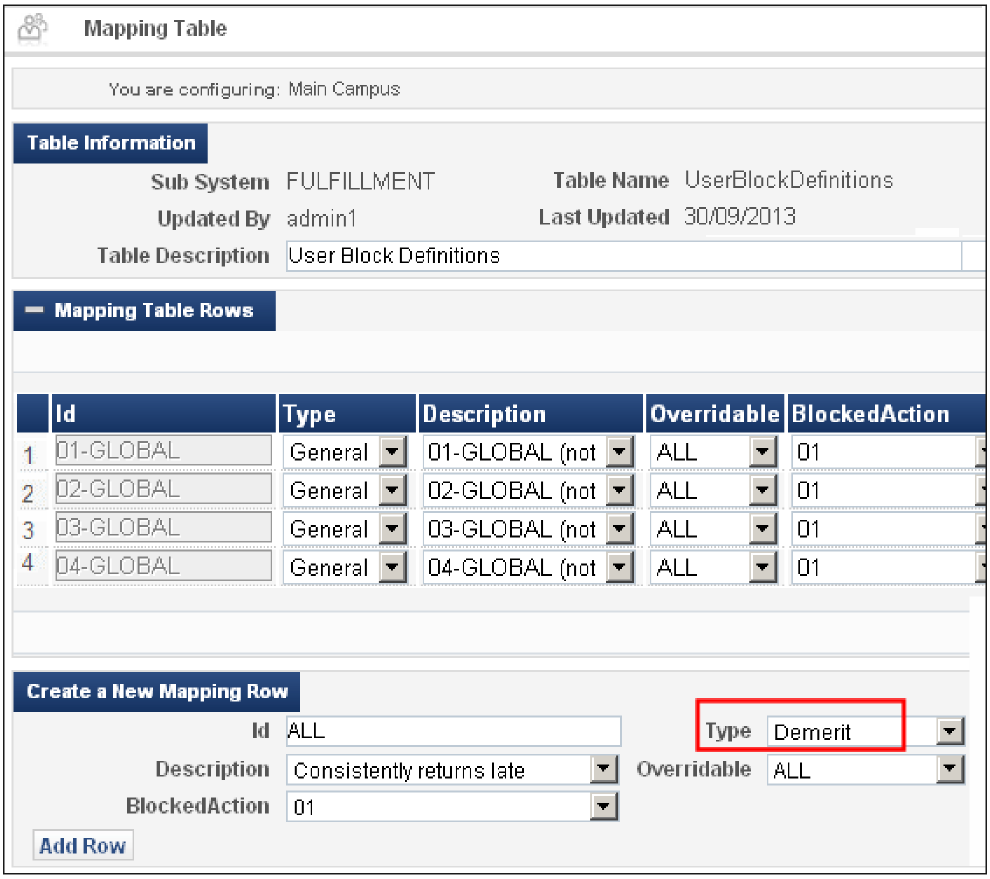


Figure 273: UserBlockDefinitions Mapping Table

2 In the **Create a New Mapping Row** section, enter the following fields to create a block definition for demerits:

- **Id** – Specify an ID for the block definition. If demerit blocks are being migrated from your legacy system, use the ID from your legacy system in order to link with the migrated blocks.
- **Type** – Select **Demerit**.
- **Description** – Select the block description.
- **Overridable** – Specify who can override this block.
- **BlockedAction** – Select the blocked action.

3 Click **Add Row**.

4 Click **Save**.

Monitoring the Demerit Job

The **Users - Remove Demerits Blocks** job runs daily to determine whether suspended users have fulfilled their suspension period and have not exceeded the configured demerit threshold while on suspension, and if so, the user's block is lifted.

To monitor the demerit job:

1. On the Monitor Jobs page (**Administration > Manage Jobs > Monitor Jobs**), click the **Scheduled** tab.
2. Select **Fulfillment** from the **Filter** drop-down list to display the list of scheduled jobs.
3. In the row containing the **Users - Remove Demerits Blocks** job, click **Actions > Job History**.

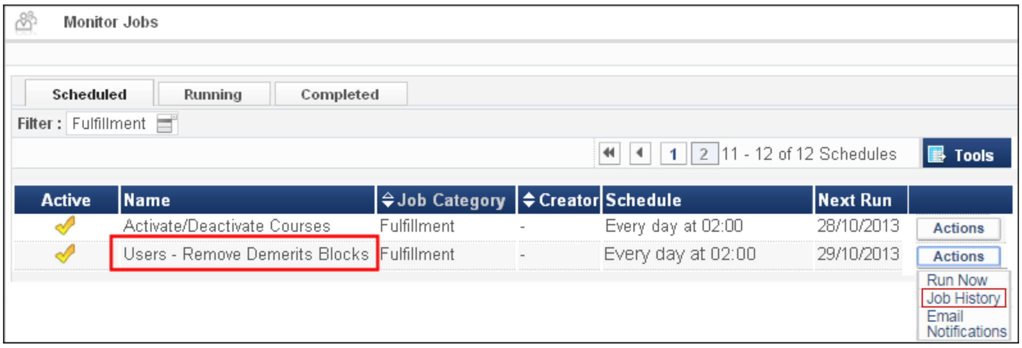


Figure 274: Demerit Job on Monitor Jobs Page

Digital Fulfillment

Configuring Digitization Departments

PERMISSIONS:

To configure digitization departments, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

A digitization department is the place where digitization requests are processed. One institutional digitization department is provided "out-of-the-box" by Alma, and is configured on the library level. If necessary, the existing department may be modified or additional departments created. You can configure digitization departments on both the institution and library levels.

You configure digitization departments on the Department List page, (**Fulfillment > Fulfillment Configuration > Configuration Menu > Digital Fulfillment > Digitization Departments**).

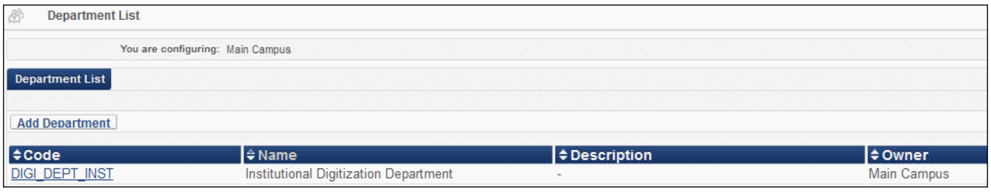


Figure 275: Department List Page

NOTE:

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

On the Department List page, the following is displayed:

- a find option. Note the option to search digitization departments by name and code.
- a list of digitization departments

Click the digitization departments code, name, description, or owner headings to sort the list alphabetically — in ascending or descending order — by digitization department code, name, description, or owner.

The following actions can be performed on this page:

- Adding a digitization department (see **Adding a Digitization Department**)
- Editing a digitization department (see **Editing a Digitization Department** on page **339**)
- Deleting a digitization department (**Actions > Delete**)

Adding a Digitization Department

You can add a digitization department to the institution or a library. If you add a digitization department to the institution, it is available for all the libraries within the institution as well.

To add a digitization department:

1 On the Department List page, click the **Add Department** button. The General Information page opens. This is the first page of a four-page wizard.

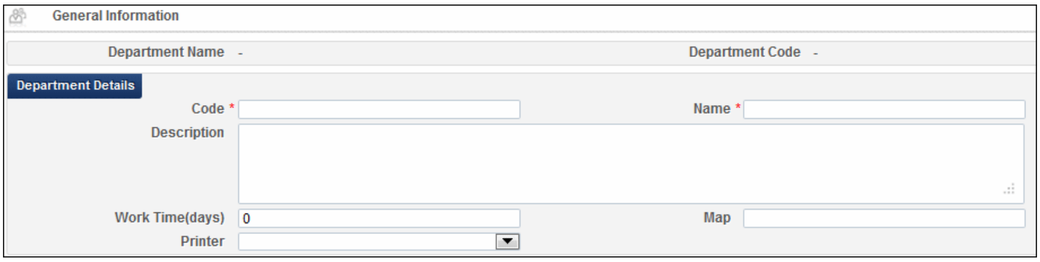


Figure 276: General Information Page

2 Enter the code and name (both required) for the new digitization department.

3 Enter information in the remaining optional fields, as described in the following table.

Table 28. Digitization Department – General Information Fields

Field	Description
Description	A textual description of the digitization department.
Work time (days)	The number of days after which an item is considered expired.
Map	The URL of a map to assist patrons in finding the department.
Printer	The printer that is associated with the digitization department can be selected from the **Printer** list. The digitization department prints all non-automated print jobs on this printer.

4 Click **Next**. The Served Libraries page opens.

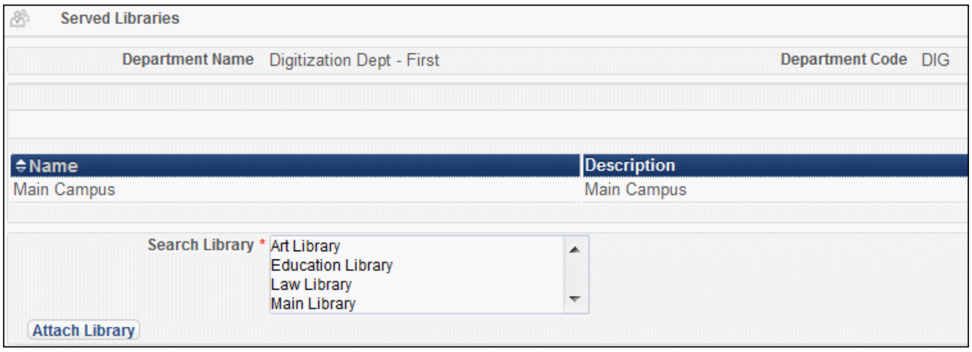


Figure 277: Served Libraries Page

5 If you are defining a digitization department for the institution, select the libraries that you want attached to the department from the **Search library** drop-down list and click **Attach Library**. The attached libraries appear in the **Name** column.

6 Click **Next**. The Contact Information page opens.

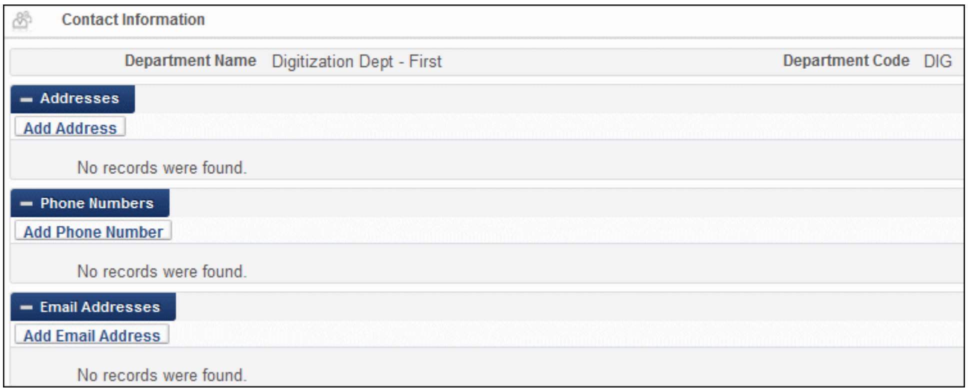


Figure 278: Contact Information Page

- To add a new address, click **Add Address**. In the Add Address dialog box, enter the required information (indicated by a red asterisk), and click **Add** if you want to add more addresses, or **Add and Close** if you do not want to add more addresses.
- To add a phone number, click **Add Phone Number**. In the Add Phone Number dialog box, enter the required information (indicated by a red asterisk), and click **Add** if you want to add more phone numbers, or **Add and Close** if you do not want to add more phone numbers.
- To add an email address, click **Add Email Address**. In the Add Email Address dialog box, enter the required information (indicated by a red asterisk), and click **Add** if you want to add more email addresses, or **Add and Close** if you do not want to add more email addresses.

7 Click **Next**. The Operators page opens.

Figure 279: Operators Page

8 To add an operator, click **Add Operator**. The **Add Operator** dialog box opens.

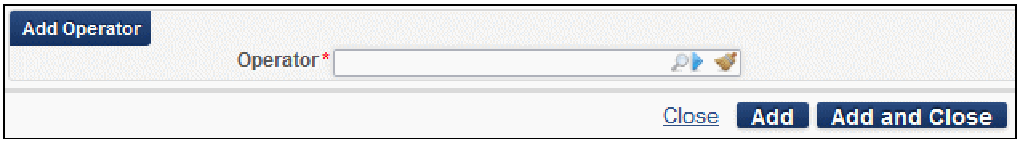


Figure 280: Add Operator Dialog Box

Click the search icon to search for and add operators, and click **Add** to add more operators, or **Add and Close** if you do not want to add more operators.

9 Click **Save**. The digitization department is added to the Department List.

Editing a Digitization Department

You can edit a digitization department for the institution or a library. However, departments configured for an institution cannot be edited when configuring departments for a library (that is, when a library is selected in the **You are configuring:** filter at the top of the Fulfillment Configuration page during department configuration).

To edit a digitization department:

1 On the Department List page select the digitization department using one of the following methods:

- Click the code number of the digitization department you want to edit.
- Scroll to the digitization department you want to edit and select **Actions > Edit**.

The General Information page opens.

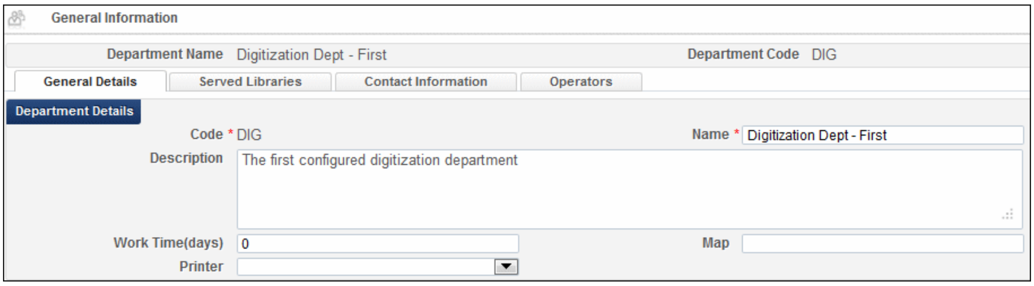


Figure 281: General Information Page

The General Information page has the following tabs:

- General Details
- Served Libraries
- Contact Information
- Operators

For details on the fields in the General Information page tabs, see **Adding a Digitization Department** on page **336**.

2. Modify the information on the tabs as required.
3. Click **Save**. The changes are saved on the Department List page.

Configuring Digitization Profile Rules

PERMISSIONS:

To configure digitization profile rules, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Digitization profile rules are a set of rules that determine the steps that digitization requests must follow depending on certain input criteria. For example, a rule can be set so that partial digitization requests must pass through the steps of approval and copyright clearance, but do not need to be deposited back into Alma before the digital file is sent directly to the patron. Another rule can be set so that full digitization requests must pass through all the steps: approval, copyright clearance, and deposit.

There is a default digitization profile rule that defines the workflow that must be followed when none of the configured digitization profile rules is met. This default rule can be modified.

Each digitization profile rule can be either enabled or disabled. By default, each new rule is enabled.

You configure digitization profile rules on the Digitization Workflow Rules List page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Digital Fulfillment > Digitization Profile Rules**). Digitization profile rules can be configured at the institution level only.

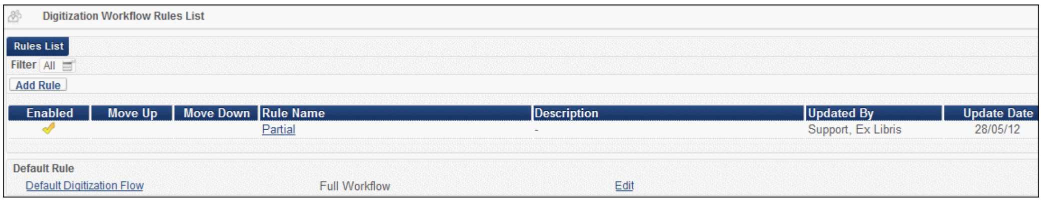


Figure 282: Digitization Workflow Rules List Page

NOTE:

Digitization profile rules can be configured at the institution level only. Select the required institution from the **You are configuring** filter on the Fulfillment Configuration page.

On the Digitization Workflow Rules List page, the following is displayed:

- a filter option, enabling you to display all digitization profile rules, or only active or inactive rules
- a list of the digitization profile rules
- the default digitization profile rule

The following actions can be performed on this page:

- Adding a digitization profile rule (see **Adding a Digitization Profile Rule**, below)
- Editing a digitization profile rule (see **Editing a Digitization Profile Rule** on page **343**)
- Deleting a digitization profile rule (**Actions > Delete**)

  You cannot delete the default digitization profile rule.

Adding a Digitization Profile Rule

You can add a new digitization profile rule to the institution. The digitization profile rules that you define apply to all libraries within the institution.

To add a new digitization profile rule:

1 On the Digitization Workflow Rules List page, click the **Add Rule** button. The Digitization Workflow Setup page opens.

Figure 283: Digitization Workflow Setup Page

NOTE:
To create a copy of an existing digitization profile rule, select **Actions > Duplicate**. Once you have copied the rule, you can modify it as needed.

2 In the **Digitization Workflow Rule Editor** section, specify a name (required) and description (optional) for the new rule.

3 In the **Input Parameters** section, specify the components of the input parameter (**Name**, **Operator**, and **Value**). A set of input parameters may look like this: *User group* = *Graduate student* or *Publication date contains 2010*.

4 Click the **Add Parameter** button. The set of input parameters is added to the list of parameters for the digitization profile rule.

5 Repeat the previous two steps to add all the required parameters for the rule.

NOTE:
All the input parameters must be fulfilled for the rule to be applied. If all the input parameters are not fulfilled, Alma proceeds to the next rule; if there are no more rules, the default rule is applied.

6 Under **Workflow Setup**, define the required workflow for the rule.

- **Approval** – The digitization request requires approval by a user with the Digital Approval Operator role. A digitization request can be processed even before approval; however, deposit and delivery can only be performed after approval.

- **Copyright clearance** – The digitization request requires copyright clearance by the Digitization Manager before delivery can be performed.
- **Deposit** – After digitization of the item has been completed, the digitized files must be deposited into the repository. If this option is not selected, the digitized files are delivered directly to the patron.
- **Document Delivery** – The digitization request requires only a portion of the resource to be digitized. For details on configuring document delivery, see **Configuring Electronic Document Delivery Rules** on page **349**.
- **Remote Digital Storage** – The digitization request ends without triggering a deposit or document delivery action. At this stage, the digitization operator stores the digitized content at a remote storage location outside of the system.

7. Click **Save** to store the new rule.
8. If you have defined more than one rule, on the Digitization Workflow Rules List page, use the **Move Up** and **Move Down** arrows to set the order of the rules. The order of the rules is important, as the system will apply the first (and only the first) appropriate, enabled rule. If no appropriate rule is found, the system uses the default rule.

NOTE:
You can click the gray/yellow check mark to the left of the rule to enable/disable it.

Editing a Digitization Profile Rule

You can edit the default digitization profile rule or a digitization profile rule that you added.

To edit a digitization profile rule:

1. On the Digitization Workflow Rules List page, select **Actions > Edit** for the digitization profile rule that contains the input parameters you want to update, or click the **Edit** link under **Default Rule** to modify the default digitization profile rule. The Digitization Workflow Setup page opens (see **Figure 283**).
2. Modify the rule name and description as required.

NOTES:

- You cannot edit an existing set of input parameters; instead, you must first delete the existing set and then add a new set.
- You cannot delete or add a new set of input parameters for the default digitization profile rule.

3. In the Input Parameters section, click **Delete** for the specific set of input parameters record you want to delete.
4. Add a new set of input parameters, as described in step 3 through step 6 in **Adding a Digitization Profile Rule** on page 341.
5. Click **Save** to store your changes to the digitization profile rule.

Configuring Access Rights

PERMISSIONS:

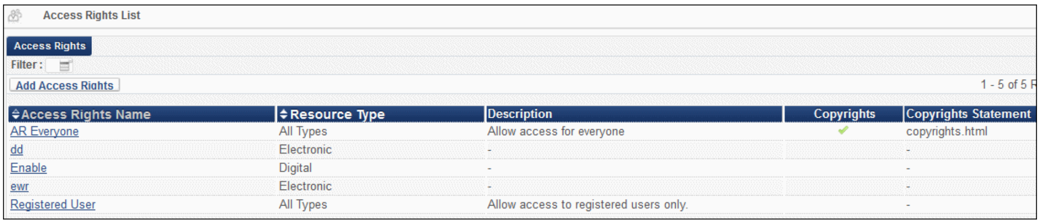
To configure access rights, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Access rights define the permissions that patrons have to request digital or electronic resources. By default, patrons have access to all digital and electronic resources. However, you can define rules for access rights that restrict patron access to specific digital and electronic resources. For example, for a specific digital resource, you can define rules that disable access in all scenarios except the following:

- patrons from a specified user group, such as post-graduate students
- patrons who access the resource from within the university computer system, based on IP addresses
- patrons with specific user IDs

You configure access rights on the Access Rights List page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Digital Fulfillment > Access Rights**). Access rights can be configured at the institution level only.



Access Rights List

Access Rights

Filter :

Add Access Rights

1 - 5 of 5 R

Access Rights Name	Resource Type	Description	Copyrights	Copyrights Statement
AR Everyone	All Types	Allow access for everyone	✔	copyrights.html
dd	Electronic	-		-
Enable	Digital	-		-
ewr	Electronic	-		-
Registered User	All Types	Allow access to registered users only.		-

Figure 284: Access Rights List Page

NOTE:

Access rights can be configured at the institution level only. Select the required institution from the **You are configuring** filter on the Fulfillment Configuration page.

On the Access Rights List page, the following is displayed:

- a filter option, enabling you to display all access rights, or digital or electronic access rights only
- a list of the access rights that are defined for the institution

Click the Access Rights Name heading or the Resource Type heading to sort the list alphabetically — in ascending or descending order — by access right name or resource type.

The following actions can be performed on this page:

- Adding access rights (see **Adding Access Rights**, below)
- Editing access rights, including configuring rules to restrict access to specific digital and electronic resources (see **Editing Access Rights** on page 346)
- Duplicating access rights (**Actions > Duplicate** and modify the relevant fields)
- Deleting access rights (**Actions > Delete**)

Adding Access Rights

You can add new access rights definitions to the institution. The access rights that you define apply to all libraries within the institution.

To add new access rights:

1 On the Access Rights List page, click the **Add Access Rights** button. The Add Access Rights dialog box opens.

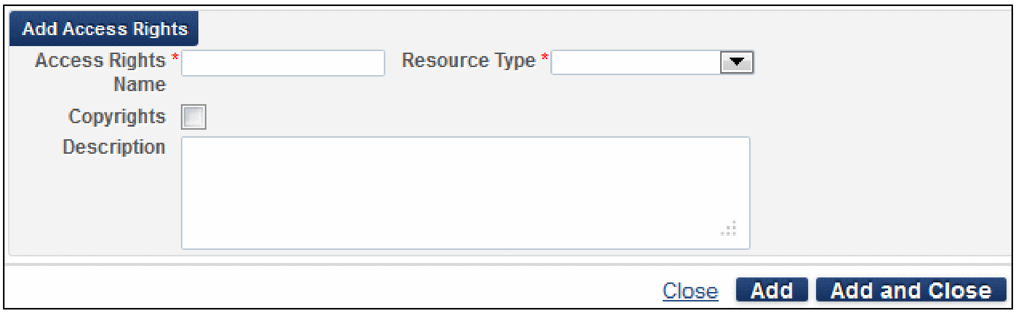


Figure 285: Add Access Rights Dialog Box

2 In the **Access rights name** field, enter a name for the access rights.

3 From the **Resource type** list, select the type of resource to which the new access rights are applicable: **All types**, **Digital**, or **Electronic**.

4 Select the **Copyrights** check box if there is a set of copyrights associated with the new set of access rights. The **Copyrights statement** drop-down list displays.

5 From the **Copyrights statement** drop-down list, select the set of copyrights to associate with the new set of access rights. When a patron requests to view an electronic or a digital resource, the specified copyrights are displayed before the patron is able to view the requested resource.

6 Click one of the following:

- **Add**: Adds the access rights to the Access Rights List page, but leaves the dialog box open so that you can add additional access rights
- **Add and Close**: Adds the access rights to the Access Rights List page and closes the dialog box

For details on adding a rule to the new access rights definition, see Editing Access Rights, below.

Editing Access Rights

You can edit the details of access rights. The details that you can edit include:

- General details about the access rights
- The rules that are included in the access rights

To edit the details of an access rights definition:

1 On the Access Rights List page, select **Actions > Edit** for an access rights record. The Edit Access Rights page opens.

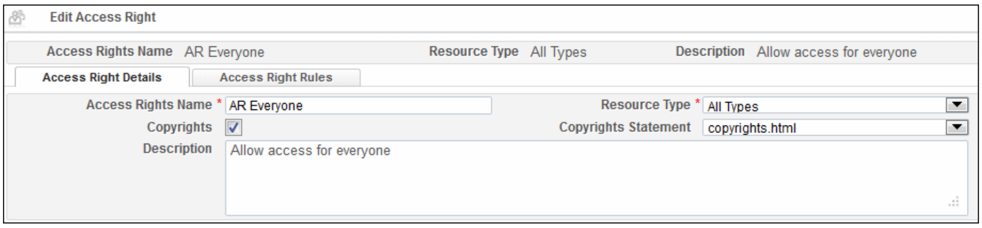


Figure 286: Edit Access Rights Page

2 In the **Access Rights Details** tab, edit the general details of the access rights definition as required. See **Adding Access Rights** on page **345** for details.

3 Click the **Access Rights Rules** tab. The Access Rights Rules tab page opens, enabling you to add or edit an access rights rule.

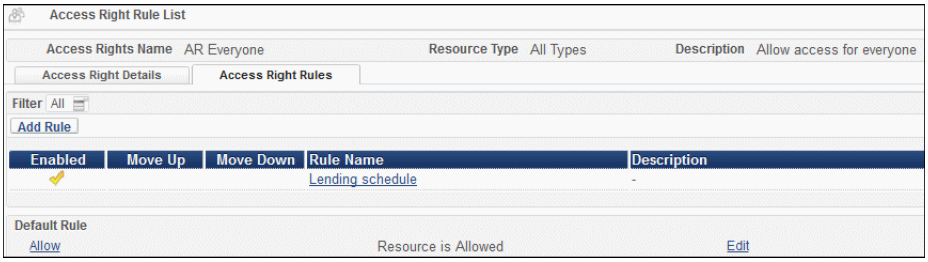


Figure 287: Access Rights Rules Tab

- **Adding a new rule:**

  a In the Access Rights Rules tab, click the **Add Rule** button. The Access Right Editor page opens.

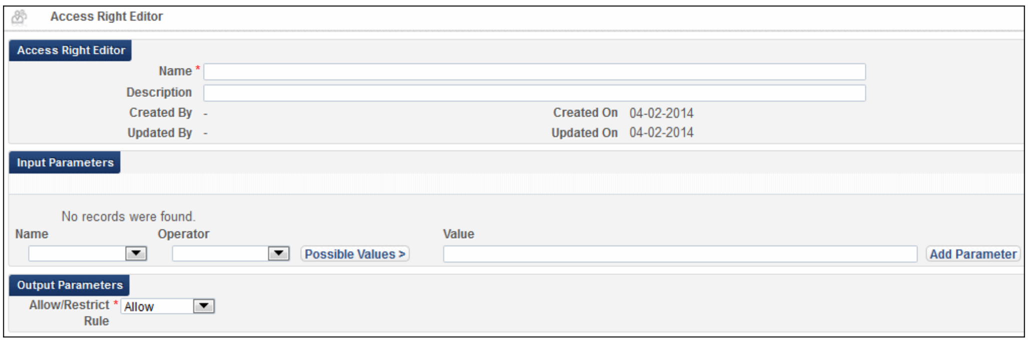


Figure 288: Access Rights Editor Page

b Enter a name (required) and a description (optional) for the new rule.

c Under **Input Parameters**, specify the components of the input parameter (**Name**, **Operator**, and **Value**). A set of input parameters may look like this: *User group = Graduate student* or *Embargo before 31/12/2010.*

When configuring an **IP Range**, enter one of the following in the **Value** field:

- A single IPV4 address (such as: **172.0.0.0**)
- An IP range, separated by a hyphen (such as: **172.0.0.0 - 173.0.0.0**)

d Click the **Add Parameter** button. The set of input parameters is added to the list of parameters for the access rights rule.

e Repeat the previous two steps to add all the required parameters for the rule.

NOTE:
All the input parameters must be fulfilled in order for the rule to be applied. If all the input parameters are not fulfilled, the default rule is applied.

f Under **Output Parameters**, in the **Allow/restrict rule** field, specify whether you want to **Allow** or **Restrict** access, based on the configured rule.

g Click **Save** to store the new rule.

h If you have defined more than one rule, in the Access Rights Rules tab, use the **Move Up** and **Move Down** arrows to set the order of the rules. The order of the rules is important, as the system will apply the first (and only the first) appropriate, enabled rule. If no appropriate rule is found, the system uses the default rule.

NOTE:
You can click the gray/yellow check mark to the left of the rule to enable/disable it.

- **Editing an existing rule:**

a In the Access Rights Rules tab, select **Actions > Edit** for the access rights rule that contains the input parameters you want to update, or click the **Edit** link under **Default Rule** to modify the default access rights rule. The Access Rights Editor page opens.

b Modify the rule name and description as required.

NOTES:

- You cannot edit an existing set of input parameters; instead, first delete the existing set and then add a new set.
- You cannot delete or add a new set of input parameters for the default access rights rule.

c In the Input Parameters section, click **Delete** for the set of input parameters record you want to delete.

d Add a new set of input parameters as described in **Adding a new rule:**, above.

e Click **Save** to store your changes to the access rights rule.

When modifying the default rule, you can only modify the name and description of the rule, and you can select the system behavior when no rules are met, as follows:

- **Allow** – When no rule is met, allow access to all types of resources.
- **Restrict** – When no rule is met, restrict access to all types of resources.

4 Click **Save** to store all your changes to the set of access rights.

Configuring Electronic Document Delivery Rules

PERMISSIONS:

To configure electronic document delivery rules, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Electronic document delivery rules provide functionality that enables libraries to take portions of a resource and make digital copies of that portion only. These rules define the conditions under which libraries can perform this function.

Each electronic document delivery rule can be either enabled or disabled. By default, each new rule is enabled.

You configure electronic document delivery rules on the Electronic Document Delivery Rules List page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Digital Fulfillment > Electronic Document Delivery Rules**).

Figure 289: Electronic Document Delivery Rules List Page

NOTE:
Electronic document delivery rules can be configured at the institution level only. Select the required institution from the **You are configuring** filter on the Fulfillment Configuration page.

On the Electronic Document Delivery Rules List page, the following is displayed:

- a filter option, enabling you to display all electronic document delivery rules, or only active or inactive rules
- a list of the electronic document delivery rules

The following actions can be performed on this page:

- Adding electronic document delivery rules (see **Adding Electronic Document Delivery Rules**, below)
- Editing electronic document delivery rules (see **Editing Electronic Document Delivery Rules** on page **352**)
- Duplicating electronic document delivery rules (**Actions > Duplicate** and modify the relevant fields)
- Deleting electronic document delivery rules (**Actions > Delete**)
- Disabling electronic document delivery rules (click the yellow check mark to the left of the electronic document delivery rule. To enable a disabled electronic document delivery rule, click the gray check mark to the left of the electronic document delivery rule.)

Adding Electronic Document Delivery Rules

You can add a new electronic document delivery rule to the institution. The electronic document delivery rules that you define apply to all libraries within the institution.

Each electronic document delivery rule can be either enabled or disabled. By default, each new rule is enabled.

To add a new electronic document delivery rule:

1. On the Electronic Document Delivery Rules List page, click the **Add Rule** button. The Electronic Document Delivery Rules Editor page opens.

NOTE:
If you want to create a copy of an existing electronic document delivery rule, select **Actions > Duplicate**. Once you have copied the rule, you can modify it as needed.

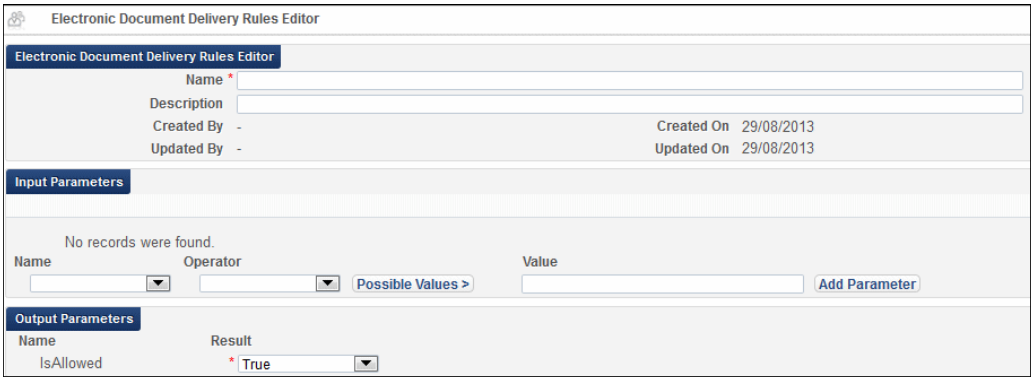


Figure 290: Electronic Document Delivery Rules Editor Page

2. In the **Electronic Document Delivery Rules Editor** section, specify a name (required) and description (optional) for the new rule.
3. In the **Input Parameters** section, specify the components of the input parameter (**Name**, **Operator**, and **Value**). A set of input parameters may look like this: *User group* = *Graduate student* or *Inventory owner* = *Art Library.*
4. Click the **Add Parameter** button. The set of input parameters is added to the list of parameters for the electronic document delivery rule.
5. Repeat the previous two steps to add all the required parameters for the rule.

NOTE:
All the input parameters must be fulfilled in order for the rule to be applied. If not all the input parameters are fulfilled, the default electronic document delivery rule will be applied.

6. In the **Output Parameters** section, select whether electronic document delivery should (**True**) or should not (**False**) be allowed.
7. Click **Save** to store the new rule.

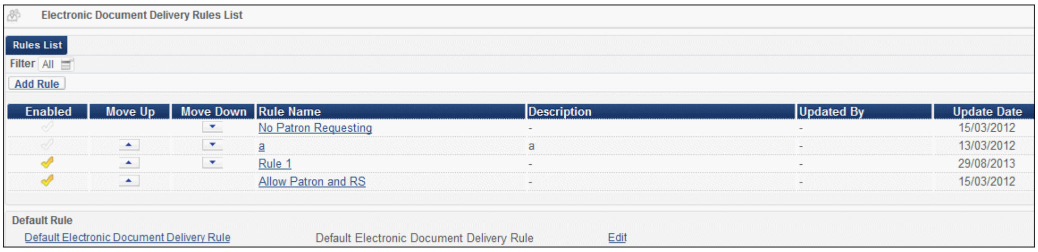


Figure 291: Electronic Document Delivery Rules List Page

8 If you have defined more than one rule, on the Electronic Document Delivery Rules List page, use the **Move Up** and **Move Down** arrows to set the order of the rules. The order of the rules is important, as the system applies the first (and only the first) appropriate, enabled rule.

NOTE:
You can click the gray/yellow check mark to the left of the rule to enable/disable it.

Editing Electronic Document Delivery Rules

You can edit the default electronic document delivery rule, or a digitization profile rule that you added.

To edit electronic document delivery rules:

1 On the Electronic Document Delivery Rules List page, select **Actions > Edit** for the electronic document delivery rule that contains the input parameters you want to update, or click the **Edit** link under **Default Rule** to update the default electronic document delivery rule. The Electronic Document Delivery Rules Editor page opens.

2 Modify the rule name and description as required.

NOTES:

- You cannot edit an existing set of input parameters. To modify an existing set of input parameters, first delete the existing set, and then add a new set.
- You cannot delete or add a new set of input parameters for the default rule.

3 Click **Delete** for the specific set of input parameters record you want to delete.

4 Add a new set of input parameters, as described in **Adding Electronic Document Delivery Rules** on page 350.

5 In the **Output Parameters** section, select whether electronic document delivery should (**True**) or should not (**False**) be allowed.

6 Click **Save** to store your changes to the electronic document delivery rule.

The default rule has no configuration parameters and can only be activated (**True**) or deactivated (**False**), as follows:

- **True** – Indicates that if no electronic document delivery rule is met, the document is still sent.
- **False** – Indicates that if no electronic document delivery rule is met, the document is not sent.

Courses

Configuring Processing Departments

PERMISSIONS:

To configure processing departments, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Each Alma institution or library can include many processing departments. Each processing department that you define at the institution level is applicable to the libraries within the institution unless separate processing departments are defined at the library level.

You configure processing departments from the Department List page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Courses > Processing Departments**).

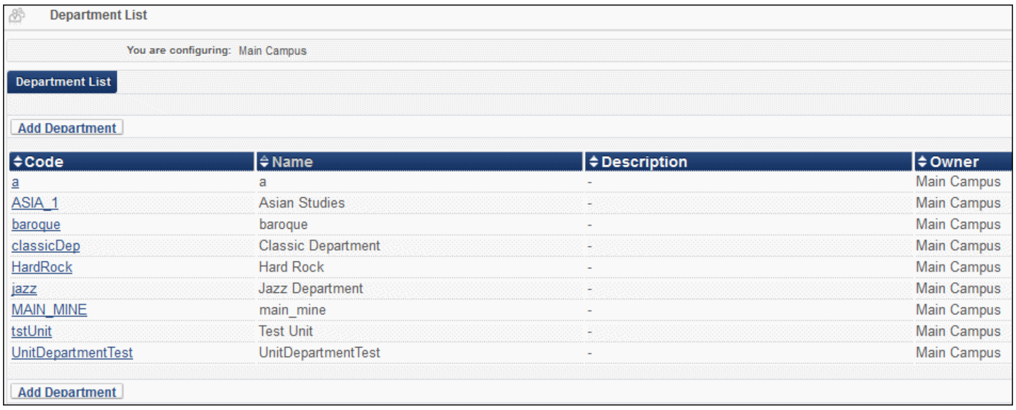


Figure 292: Department List Page

NOTE:

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

This page is the same as that used for configuring digitization departments. For instructions on adding, editing, and deleting processing departments, see **Configuring Digitization Departments** on page 335.

Configuring Academic Departments

PERMISSIONS:

To configure academic departments, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Alma lets you define academic departments with which you can associate courses. For example, you can create an academic department for **Exact Sciences**. You can then associate a particular course (for example, **Introduction to Chemistry**) with this academic department. Note that you can define academic departments at the institution level only.

Academic departments may be either enabled or disabled. By default, all new academic departments are enabled. The defined academic departments appear in all **Academic department** drop-down lists in Alma, in the same order in which they are listed on the Code Table page on which you define them. Only enabled academic departments appear in the **Academic department** drop-down lists.

You configure academic departments from the Code Table page for Course Faculties (**Fulfillment > Fulfillment Configuration > Configuration Menu > Courses > Academic Departments**).

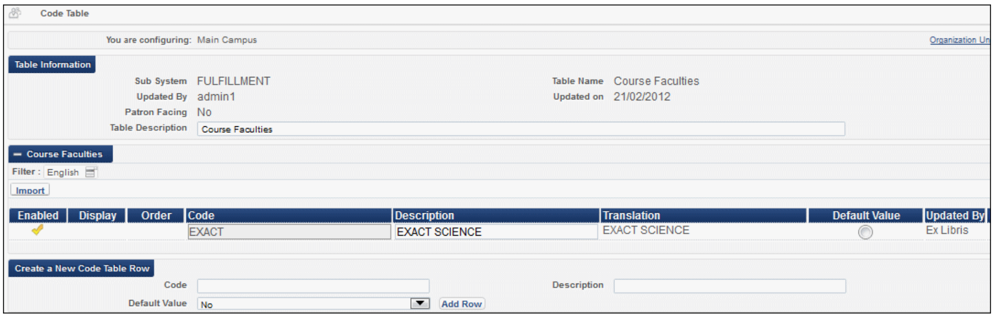


Figure 293: Code Table Page – Course Faculties (Academic Departments)

NOTE:
Ensure that you are within the context of the institution whose academic departments you want to configure by selecting the required institution from the **You are configuring** filter on the Fulfillment Configuration page.

The Code Table page displays:

- details about the table that contains the academic departments for the institution. Most of the details are system-generated and cannot be edited.
- a list of the academic departments that are defined for the institution
- a group of input fields that enable you to define and create a new academic department

The following actions can be performed on this page:

This section describes:

- Adding an academic department (see **Adding an Academic Department**)
- Editing an academic department (see **Editing Academic Departments** on page **357**)
- Deleting an academic department (click **Delete**)
- Disabling an academic department (click the yellow check mark to the left of the academic department. To enable a disabled academic department, click the relevant gray check mark .)

Adding an Academic Department

You can add new academic departments to the institution. These are applied to all the libraries within the institution.

If you prefer to use the Import option to populate the code table, see **Importing Information to Code Tables** in the *Alma Administration Guide* for more information.

To add a new academic department:

1. On the Code Table page, under **Create New Code Table Row**, enter a code for the new academic department.

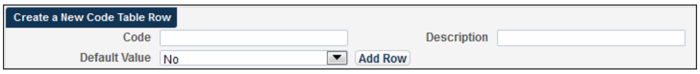


Figure 294: Create New Academic Department Row Section of the Code Table Page

2. Enter a code and description for the new academic department.
3. From the **Default value** drop-down list, select **Yes** if the new academic department will be the default academic department whenever an **Academic department** drop-down list is displayed.
4. Click the **Add Row** button. The new academic department is displayed at the bottom of the list of defined academic departments. Note that by default, each new academic department is enabled. To disable an academic department, click the yellow check mark to the left of the academic department. Use the **Display** or **Order** up and down arrows to set the order of the academic department.
5. Click **Customize** to store the new academic department details in the system.

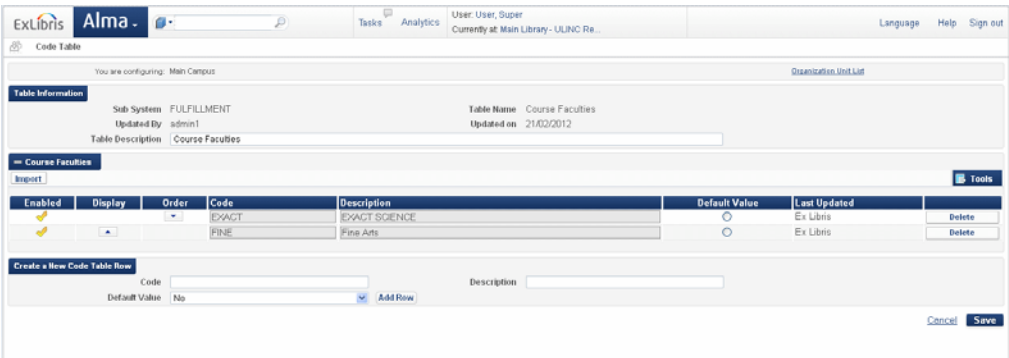


Figure 295: Code Table Page – Academic Departments

Editing Academic Departments

You can edit the details of any academic department for the institution.

To edit the details of an academic department:

1 On the Code Table page, under **Course Faculties**, locate the academic department that you want to edit.

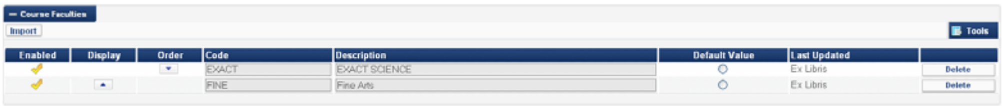


Figure 296: Code Table Page – List of Academic Departments

NOTE:
You can click the gray/yellow check mark to the left of the academic department to enable/disable it.

2 Use the **Display** or **Order** up and down arrows to set the order of the academic departments. The academic departments will appear in the defined order in all **Academic department** drop-down lists.

3 Modify the academic department code and description as required.

4 Click the radio button in the **Default Value** column if the new academic department will be the default academic department whenever an **Academic department** drop-down list is displayed.

5 Click **Customize** to store the modified academic department in the system.

Configuring Additional Reading List Citation Statuses

PERMISSIONS:

To configure additional reading list statuses, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Alma enables you to assign a status to reading lists for courses (see **Managing Reading Lists** on page **196**). You can also configure additional reading list citation statuses.

You configure additional reading list citation statuses on the Code Table page for Additional Statuses of Reading List Citations (**Fulfillment > Fulfillment Configuration > Configuration Menu > Courses > Additional Reading List Citation Statuses**).

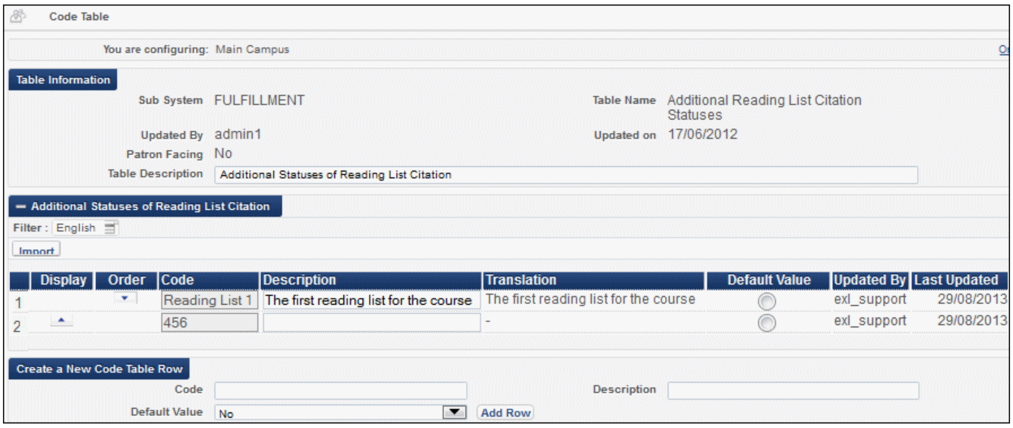


Figure 297: Code Table Page – Additional Reading List Citation Statuses

NOTE:

Ensure that you are within the context of the institution/library whose additional reading list citation statuses you want to configure by selecting the required institution/library from the **You are configuring** filter on the Fulfillment Configuration page.

The Code Table page displays:

- details about the reading list citation statuses for the institution/library. Most of the details are system-generated and cannot be edited.
- a list of the reading list citation statuses that are defined for the institution/library
- a group of input fields that enable you to define and create a new reading list citation status

The following actions can be performed on this page:

- Adding additional reading list citation statuses (see **Adding Additional Reading List Citation Statuses**, below)
- Editing additional reading list citation statuses (see **Editing Additional Reading List Citation Statuses** on page **359**)
- Deleting additional reading list citation statuses (click **Delete**)

Adding Additional Reading List Citation Statuses

You can add a reading list citation status to an institution or a library. The citation statuses that you add to an institution apply to all libraries within the institution.

To add a reading list citation status:

1 On the Code Table page, under **Create New Code Table Row**, enter a code and description for the additional reading list citation status.

2 From the **Default value** drop-down list, select **Yes** if the additional reading list citation status will be the default reading list citation status whenever an **Reading list citation status** drop-down list is displayed.

3 Click the **Add Row** button. The new reading list citation status is displayed at the bottom of the list of reading list citation statuses. Note that by default, each new reading list citation status is enabled. Use the **Move Up** and **Move Down** arrows to set the order of the reading list citation statuses.

4 Click **Customize** to store the new reading list citation status in the system.

Editing Additional Reading List Citation Statuses

You can edit the details of any reading list citation status.

To edit the details of a reading list citation status:

1 On the Code Table page, under **Additional Statuses of Reading List Citation**, locate the reading list citation status that you want to edit.

2 Use the **Display** or **Order** up and down arrows to set the order of the reading list citation status. The reading list citation statuses will appear in the defined order in all **Reading list citation status** drop-down lists.

3 Modify the reading list citation status code and description as required.

4 Select **Default value** if the additional reading list citation status will be the default reading list citation status whenever a **Reading list citation status** drop-down list is displayed.

5 Click **Customize** to store the modified reading list citation status in the system.

Configuring Course Terms

PERMISSIONS:

To configure additional reading list statuses, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can configure which terms are displayed in the **Terms list** field when adding a new course on the Manage Course Information page

(**Fulfillment > Course Reserves > Courses > Add Course)**. For more information, see Managing Courses on page 191.

You can edit course terms on the Code Table page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Courses > Course Terms**). It is not possible to add or delete course terms.

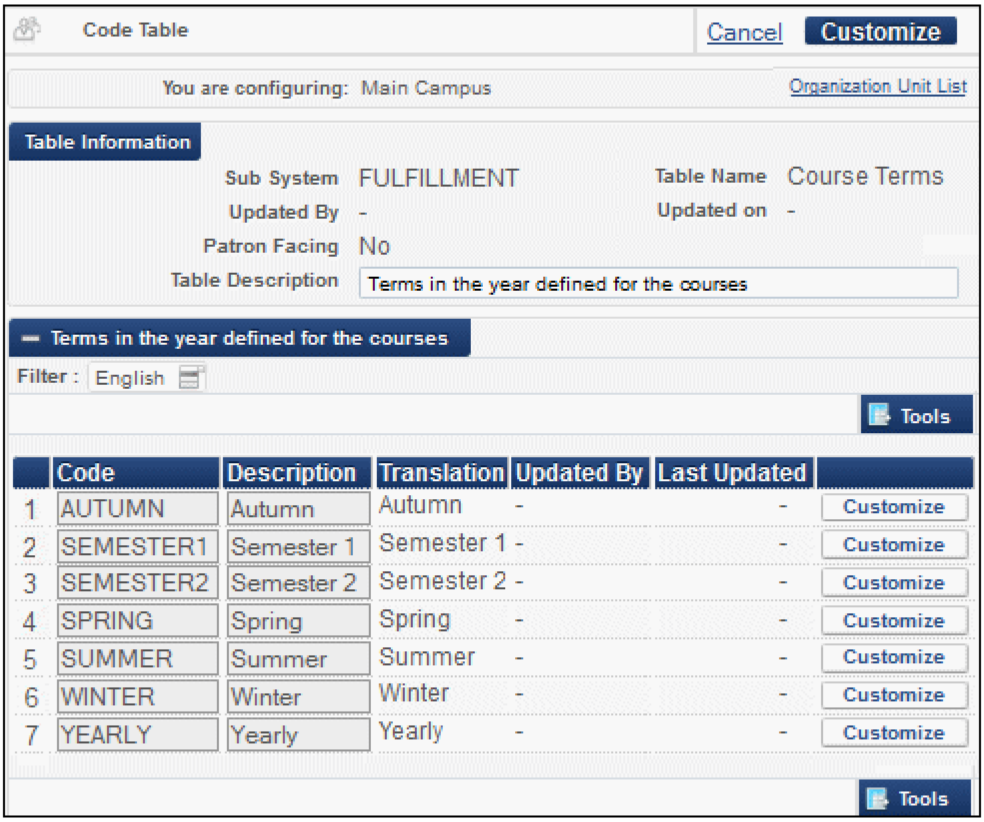


Figure 298: Course Terms Page

Editing Course Terms

You can edit the description of a course term that is displayed in the Terms list when adding a new course.

To edit the description of a course term:

1 Click the **Customize** button in the row of the course term whose description you want to edit. The **Customize** button changes to **Restore**.

2 Edit the course term description.

3 Click the **Customize** button at the bottom of the screen.

The new course term description is displayed in the **Terms list** field when adding a new course.

To restore the course term description:

1. Click the **Restore** button for the course term whose description you want to restore.
2. Click the **Customize** button at the bottom of the screen.

The course term description is restored.

Resource Sharing

Configuring Workflow Profiles

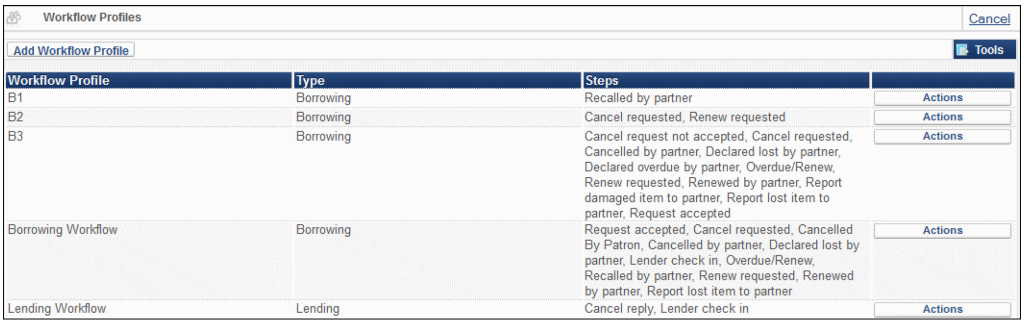
PERMISSIONS:

To configure workflow profiles, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Alma enables you to configure borrowing and lending workflows to be used when adding a new partner. (For information on configuring partners, refer to **Resource Sharing Requests** in the *Alma Integrations with External Systems Guide*.) These workflows control the actions that can then be performed for the defined partner on the borrowing and lending request task lists.

You configure workflow profiles on the Workflow Profiles page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Workflow Profiles**).



Workflow Profile	Type	Steps	
B1	Borrowing	Recalled by partner	Actions
B2	Borrowing	Cancel requested, Renew requested	Actions
B3	Borrowing	Cancel request not accepted, Cancel requested, Cancelled by partner, Declared lost by partner, Declared overdue by partner, Overdue/Renew, Renew requested, Renewed by partner, Report damaged item to partner, Report lost item to partner, Request accepted	Actions
Borrowing Workflow	Borrowing	Request accepted, Cancel requested, Cancelled By Patron, Cancelled by partner, Declared lost by partner, Lender check in, Overdue/Renew, Recalled by partner, Renew requested, Renewed by partner, Report lost item to partner	Actions
Lending Workflow	Lending	Cancel reply, Lender check in	Actions

Figure 299: Workflow Profiles Page

NOTE:
Workflow profiles can be configured at the institution level only. Select the required institution from the **You are configuring** filter on the Fulfillment Configuration page.

The following actions can be performed on this page:

- Adding workflow profiles (see **Adding Workflow Profiles**, below)
- Editing workflow profiles (**Actions > Edit**)
- Deleting workflow profiles (**Actions > Delete**)

  If a workflow is associated with a resource sharing partner, you cannot delete it until you first delete the partner.

Adding Workflow Profiles

You can add workflow profiles to be available when adding resource sharing partners. The workflow profiles that you add on the institution level are available for all libraries within the institution.

To add a workflow profile:

1. On the Workflow Profiles page, click the **Add Workflow Profile** button. The Add Workflow Profile dialog box opens.

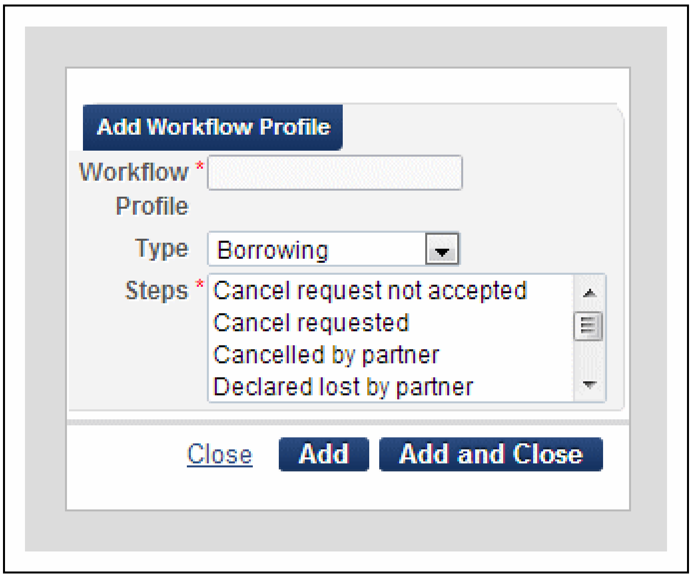


Figure 300: Add Workflow Profile

2. Enter a name for the workflow profile.
3. From the **Type** drop-down list, select **Borrowing** or **Lending**.

4 Select the steps you want added to the profile. More than one step can be selected. These steps control the actions that can be performed on the borrowing and lending request task lists for the partner associated with the workflow.

The available steps depend on the workflow profile type selected in step 3, and are described in the following table:

Table 29. Workflow Profile Steps

Type	Step	Description
Borrowing	Automatic renew	Enables automatic renewal of requests received (via ISO) for borrowing partners linked to the specified workflow. A request whose profile contains this step is automatically renewed as per the requested due date, and the request's status updates to **Renew Request Accepted.**
Borrowing (continued)	Cancel request not accepted	A cancellation request can be rejected by the partner
	Cancel requested	A requested item can be canceled by the borrowing partner
	Canceled by patron	A request can be canceled by a patron
	Canceled by partner	A request can be canceled by the lending partner and notification is received by the borrowing partner
	Declared lost by partner	An item can be declared lost by the partner
	Declared overdue by partner	An item can be declared overdue by the partner
	Lender check in	The request is not closed by the borrower until a message is received that the item was checked in
	Manual renew	Enables manually approving renewal requests for borrowing partners linked to the specified workflow profile. For details on system behavior when this option is selected, see the **Renew** and **Renew Reply** entries in Table 12.
	Overdue/Renew	An overdue item can be renewed by the partner
	Recalled by partner	The request can be recalled by the partner

Table 29. Workflow Profile Steps

Type	Step	Description
	Renew requested	Enables requesting renewal of resource sharing borrowing requests can be renewed
	Report damaged item to partner	A damaged item can be reported to the partner
	Report lost item to partner	A lost item can be reported by the partner
	Request accepted	A requested item can be accepted by the partner
Lending	Cancel reply	Not currently supported
	Lender check in	Sends a confirmation message to the borrower that the item has been checked in
	Overdue item	The requested item can be marked as overdue
	Patron renewal	Enables a patron to request renewal of resource sharing items. In addition to selecting this option, you must also ensure that the **Is Renewable** policy value in the relevant TOU is set to **Is Renewable** (see **Configuring Fulfillment Units, Policies and Item Policies, and Terms of Use** on page 273).
	Recalled item	The requested item can be recalled
	Renewal response	Indicates that the borrower requesting renewal is waiting for a response from the lender before renewal can be carried out. When this step is selected, the status of a request for which renewal was requested becomes **Renew Requested**.
	Staff renewal	Indicates that renewal can be invoked by a staff member. When this step is selected, the **Renew** link displays on the Resource Sharing Borrowing Requests page.

5 Click one of the following:

- **Add**: Adds the workflow profile but leaves the dialog box open so that you can add additional workflow profiles
- **Add and Close**: Adds the workflow profile and closes the dialog box

The workflow profile is now available in the **Borrowing workflow** or **Lending workflow** drop-down list on the Resource Sharing Partner page.

Configuring Copyrights

PERMISSIONS:

To configure copyrights, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Alma enables you to enter a copyright statement that is displayed to patrons before they are able to request an item from a partner.

You configure copyrights on the Configuration File page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Copyrights**).

Figure 301: Configuration File Page

NOTE:

Copyrights can be configured at the institution level only. Select the required institution from the **You are configuring** filter on the Fulfillment Configuration page.

To enter a copyright statement:

1 In the **Content** field, enter the copyright statement that you want displayed to patrons.

2 From the **Enabled** drop-down list, select **Yes**.

3 Click **Customize** to store the new copyright statement in the system.

Configuring Rota Assignment Rules

PERMISSIONS:

To configure rota assignment rules, you must have one of the following roles:

- Fulfillment Services Operator
- Fulfillment Services Manager

Rota assignment rules determine the conditions under which rota templates are invoked.

You configure rota assignment rules on the Rota Assignment Rules List page (**Fulfillment > Fulfillment Configuration > Resource Sharing > Rota Assignment Rules**).

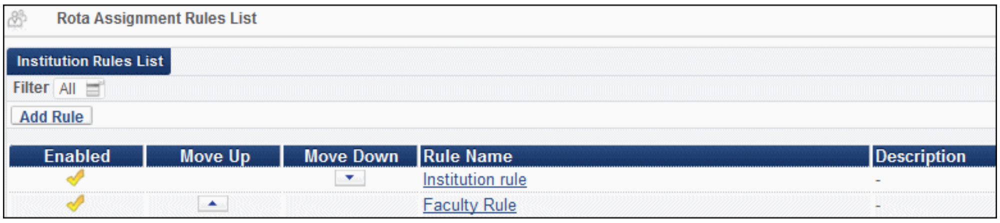


Figure 302: Rota Assignment Rules List Page

NOTE:

Rota assignment rules can be configured at either the institution or library level. Select the required institution or library from the **You are configuring** filter on the Fulfillment Configuration page.

The following actions can be performed on this page:

- Configuring rota assignment rules for an institution (see **To configure rota assignment rules for an institution:**, below)
- Configuring rota assignment rules for a library (see **To configure rota assignment rules for a library:** on page 368)

To configure rota assignment rules for an institution:

1. On the Rota Assignment Rules List page (**Fulfillment > Fulfillment Configuration > Resource Sharing > Rota Assignment Rules**), click **Add Rule**. The Rota Assignment Rules page displays.

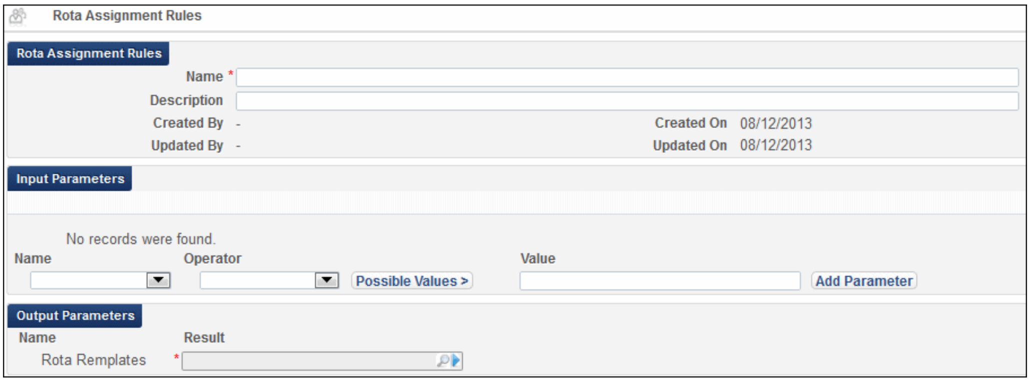


Figure 303: Rota Assignment Rules Page

2. In the **Rota Assignment Rules** section, enter a rule for the name in the **Name** field.
3. Configure input and output parameters in the relevant fields. Configuring a rota assignment rule is done in the same manner as other rule configurations in Alma (see **Configuring Automatic Loan Renewal Rules** on page 306).
4. Click **Save**. The configured rule displays on the Rota Assignment Rules List page.

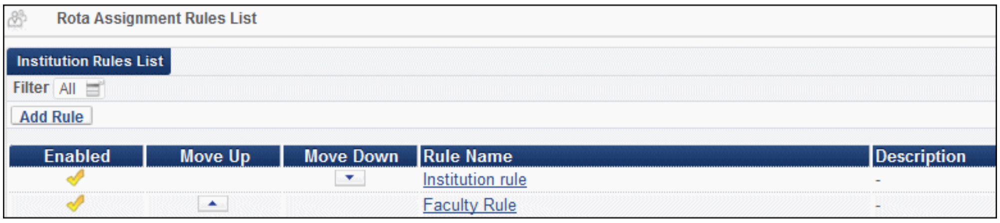


Figure 304: Rota Assignment Rules List Page

When the configured rule parameters are met for a resource sharing request, the specified rota template is invoked.

To attach a rota to a request according to the configured rules, click the **Recalculate Rota Assignment** link on the Resource Sharing Borrowing Requests page (see **Manually Adding a Request** on page 135).

To configure rota assignment rules for a library:

1. On the Fulfillment Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu**), ensure that a library is selected in the **You are configuring** filter at the top of the page.
2. Open the Rota Assignment Rules List page (**Resource Sharing > Rota Assignment Rules**). Rules configured on the library level display in the **Library Rules List** section, rules configured on the institution level display in the **Institution Rules List** section, and rules configured on the network level display in the **Network Rules List** section.

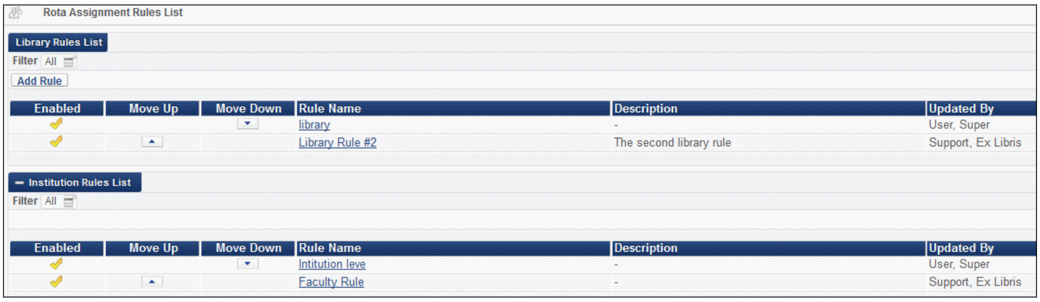


Figure 305: Rota Assignment Rules List Page

NOTE:
The **Network Rules List** section displays only after the Distribute Central Resource Sharing Configuration job runs and copies the rota templates to the NZ's member institutions. For details on the Distribute Central Resource Sharing Configuration job output, see the **Distribute Central Resource Sharing Configuration** entry in **Table 15** in the *Alma Administration Guide*.

3. To copy an institution rule to the library level:
   a. In the Institution Rules List section, click **Copy to Library**. The Rota Assignment Rules page opens.
   b. Modify the rule parameters, as necessary, and click **Save**. The specified rule displays in the Library Rules List section.

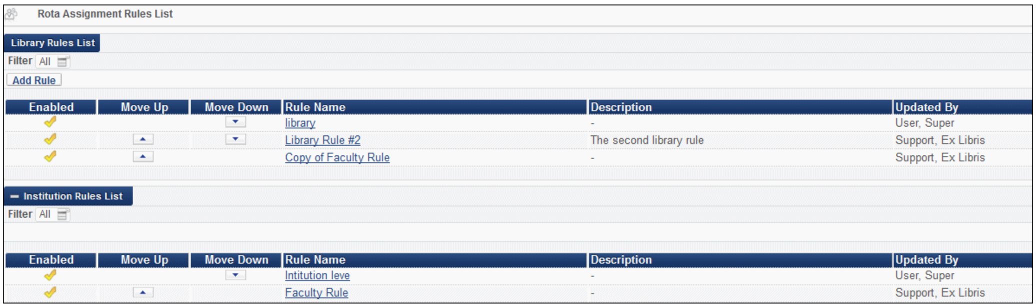


Figure 306: Rota Assignment Rules List Page with Rule Copied to Library

4 To copy a network rule to the institution level:

   a In the Network Rules List section, select **Actions > Duplicate**. The Rota Assignment Rules page opens, where you can modify the parameters of the rota assignment rule.

   b Click **Save**. The rule saves as an institution rule (**Scope = Institution**), and the **Update Date** value updates accordingly.

Configuring Locate Profiles

PERMISSIONS:

To configure locate profiles, you must have one of the following roles:

- Fulfillment Services Operator
- Fulfillment Services Manager

A locate profile defines how you search the resource sharing partner's catalog. After configuring a location profile, you associate the profile to a partner.

You configure locate profiles on the Locate Profiles List page (**Fulfillment > Fulfillment Configuration > Resource Sharing > Locate Profiles**).

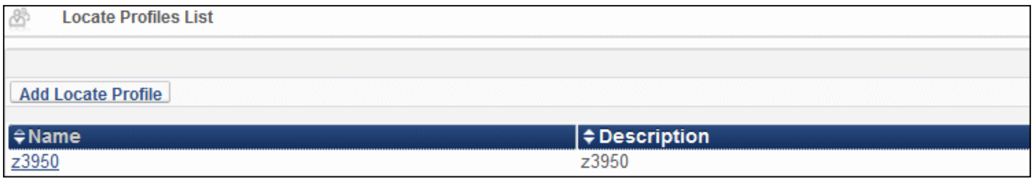


Figure 307: Locate Profiles List Page

NOTE:
Locate profiles can be configured at the institution level only. Select the required institution from the **You are configuring** filter on the Fulfillment Configuration page.

The following actions can be performed on this page:

- Adding locate profiles (see **Adding Locate Profiles**, below)
- Editing locate profiles (**Actions > Edit**; the fields displayed on the Locate Profile Parameters tab page depend on the type of locate profile selected)
- Duplicating locate profiles (**Actions > Duplicate** and modify the relevant fields)
- Deleting locate profiles (**Actions > Delete**)

Adding Locate Profiles

You can add a locate profile to Alma.

To add a locate profile:

1. On the Locate Profiles List page (**Fulfillment > Fulfillment Configuration > Resource Sharing > Locate Profiles**), click **Add Locate Profile**. The Locate Profile Details page displays.

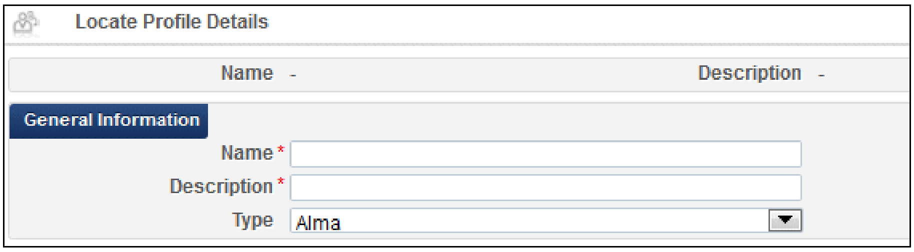


Figure 308: Locate Profile Details Page

2. Enter a name and description for the locate profile in the relevant fields.
3. In the **Type** field, select the profile type. Choose from the following options:
   - **Alma**: Indicates that the sharing institution also uses Alma.
   - **No Locate**: Indicates that the default partner is used and therefore, no attempt is made to locate another partner.
   - **Z39.50**: Indicates that the Z39.50 communications protocol is to be used for searching remote catalogs. For details on the Z39.50 search protocol, see **Z39.50 Search** in the *Alma Integrations With External Systems Guide*.

4 Click **Next**. The page that displays depends on the selected profile type, as follows:

- **Alma**

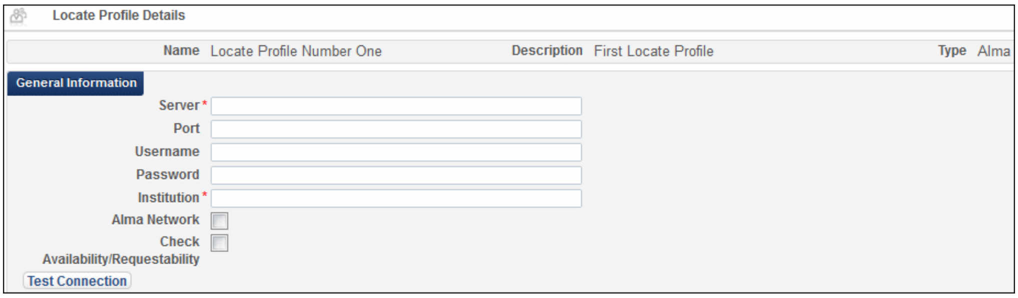


Figure 309: Locate Profile Details Page for Alma Profile Type

- **Z39.50**

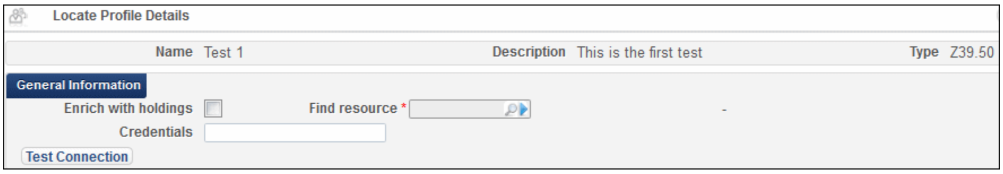


Figure 310: Locate Profile Details Page for Z39.50 Profile Type

NOTE:
If the **No Locate** profile type was selected, no additional parameters can be configured. Click **Save** to save the locate profile.

5 For an Alma profile type, configure the displayed fields, as follows:

a In the **Server** field, enter the URL of the target Alma.

b In the **Port** field, enter the port number on which the external Alma system is located. This field may also be left blank.

c In the **Username** field, enter the username of the Z39.50 external interface in the target Alma system.

d In the **Password** field, enter the password of the Z39.50 external interface in the target Alma system. The characters you enter are encrypted.

e In the **Institution** field, enter the institution in which the external Alma system is located.

f If you want to know which of the network members has the resource, select the **Alma network** check box.

g Select the **Check availability/requestability** check box for the profile to check whether an item is available and requestable in the institution.

- **Available** – Indicates that the item’s status is Item in Place
- **Requestable** – Indicates that the item can be requested as part of a resource sharing request

NOTES:

- When selecting this check box, the **Alma network** check box is disabled. When selecting the **Alma network** check box, this check box is disabled.
- Availability and Requestability are checked on the institution level only.

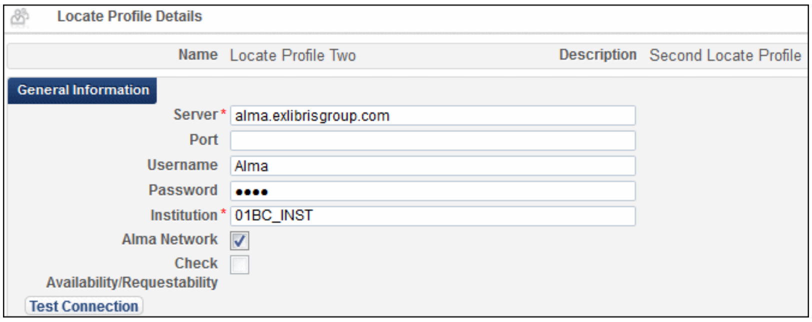


Figure 311: Locate Profile Details Page with Configured Details

h Click **Test Connection** to ensure that the parameters you entered for the connection are valid.

6 For a Z39.50 profile type, configure the displayed fields, as follows:

a To add holdings to the search, select the **Enrich with holdings** check box. The **holding field** and **subfield** fields display. Enter the relevant values in the fields.

b Click the **Find resource** field to search for a resource. The Search External Resource Setup page displays.

c Enter search criteria in the **Find** box to search for a resource, and click **Go**. The Search External Resource Setup page displays. Choose an entry and click **Select** to return to the Locate Profile Details page.

d In the **Credentials** field, enter any relevant credentials for the search.

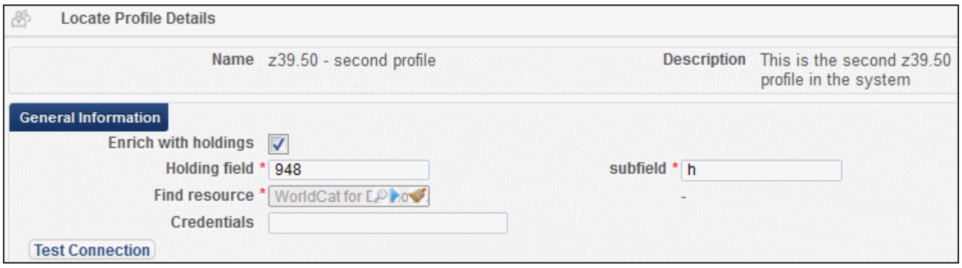


Figure 312: Locate Profile Details Page for Z39.50 with Configured Details

e Click **Test Connection** to ensure that the parameters you entered for the connection are valid.

Configuring Shipping Cost Lender Rules

PERMISSIONS:

To configure shipping cost lender rules, you must have one of the following roles:

- Fulfillment Administrator
- General System Administrator

Shipping cost lender rules enable you to configure the conditions under which shipping costs are applied to resource sharing lending requests.

To configure shipping cost lender rules:

1. On the Shipping Cost – Lender Rules List page (**Fulfillment > Fulfillment Configuration > Resource Sharing > Shipping Cost Lender Rules**), click **Add Rule**. The Shipping Cost – Lender Rules page displays.

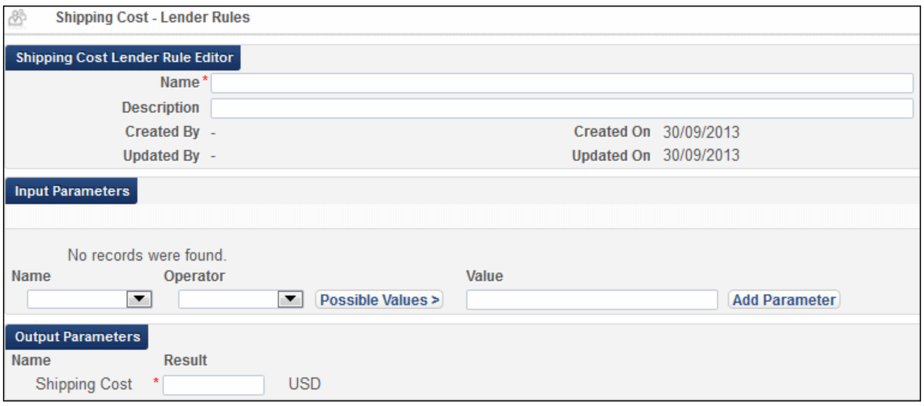


Figure 313: Shipping Cost – Lender Rules Page

2 Enter a name for the rule in the **Name** field.

3 Configure input and output parameters in the relevant fields. Configuring a shipping cost lender rule is performed in the same manner as other rule configurations in Alma (see **Configuring Automatic Loan Renewal Rules** on page 306).

4 Click **Save**. The shipping cost rule displays on the Shipping Cost – Lender Rules List page.

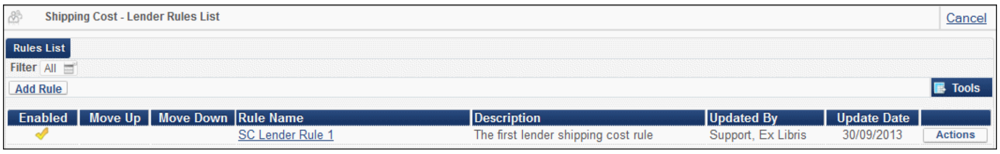


Figure 314: Shipping Cost – Lender Rules List Page

Configuring Shipping Cost Borrower Rules

PERMISSIONS:

To configure shipping cost borrower rules, you must have one of the following roles:

- Fulfillment Administrator
- General System Administrator

Shipping cost borrower rules enable you to configure the conditions under which shipping costs are applied to resource sharing borrower requests.

To configure shipping cost borrower rules:

1 On the Shipping Cost – Borrower Rules List page (**Fulfillment > Fulfillment Configuration > Resource Sharing > Shipping Cost Borrower Rules**), click **Add Rule**. The Shipping Cost – Borrower Rules page displays.

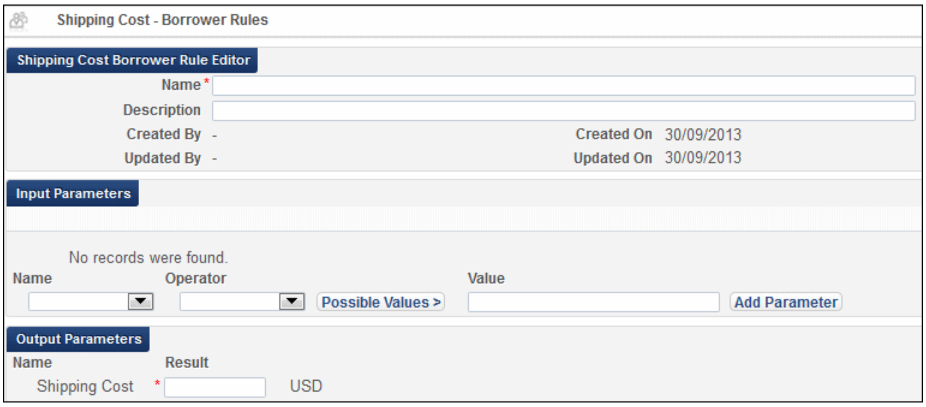


Figure 315: Shipping Cost – Borrower Rules Page

2 Enter a name for the rule in the **Name** field.

3 Configure input and output parameters in the relevant fields. Configuring a shipping cost borrower rule is performed in the same manner as other rule configurations in Alma (see **Configuring Automatic Loan Renewal Rules** on page 306).

4 Click **Save**. The shipping cost rule displays on the Shipping Cost – Borrower Rules List page.

Figure 316: Shipping Cost – Borrower Rules List Page

Configuring Sending Borrowing Request Rules

PERMISSIONS:

To configure sending borrowing request rules, you must have one of the following roles:

- Fulfillment Administrator
- General System Administrator

Sending borrowing request rules indicate when a borrowing request is to be sent automatically. Any borrowing request that matches a rule for automatic sending is automatically sent to the active partner, without requiring staff intervention.

Sending Borrowing request rules display on the Sending Borrowing Request Rules List page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Sending Borrowing Request Rules**).

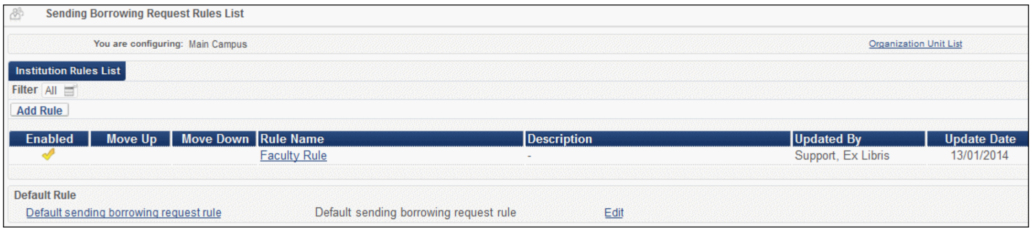


Figure 317: Sending Borrowing Request Rules List Page

The following actions can be performed on this page:

- Adding sending borrowing request rules (see **Adding Sending Borrowing Request Rules**, below)
- Editing sending borrowing request rules (**Actions > Edit**)
- Duplicating sending borrowing request rules (**Actions > Duplicate** and modify the relevant fields)
- Deleting sending borrowing request rules (**Actions > Delete**)
- Editing the Default Sending Borrowing Request Rule (see **Editing the Default Sending Borrowing Request Rule**, below)
- Disabling a sending borrowing request rule (click the yellow check mark to the left of the sending borrowing request rule. To enable a sending borrowing request rule, click the relevant gray check mark .)

Adding Sending Borrowing Request Rules

You can add a Sending Borrowing Request Rule.

To add sending borrowing request rules:

1 On the Sending Borrowing Request Rules page, click **Add Rule**. The Sending Borrowing Request Rules page opens.

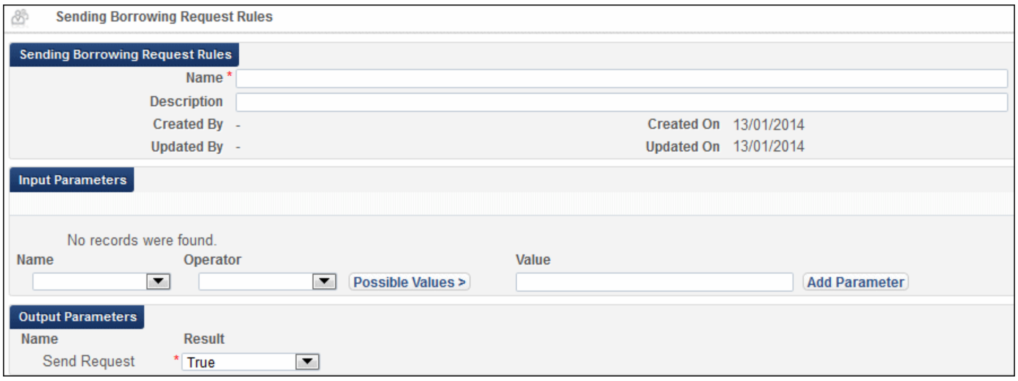


Figure 318: Sending Borrowing Request Rules Page

2 In the **Sending Borrowing Request Rules** section, enter a name in the **Name** field.

3 Configure input and output parameters in the relevant fields. Configuring a sending borrowing request rule is done in the same manner as other rule configurations in Alma (see Configuring Automatic Loan Renewal Rules on page 306).

4 Click **Save**. The configured rule displays on the Sending Borrowing Request Rules List page.

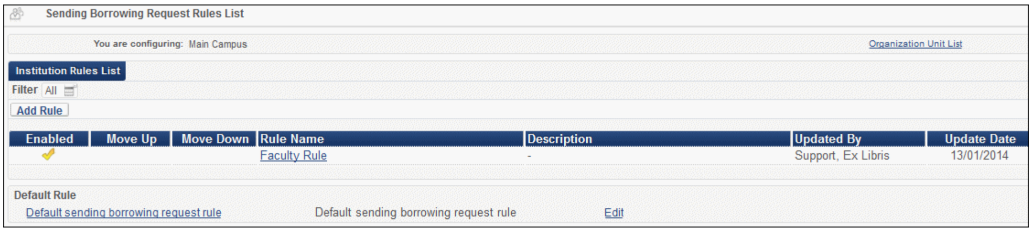


Figure 319: Sending Borrowing Request Rules List Page

When the configured rule parameters are met for a resource sharing borrowing request, the request is automatically sent after an automatic rota assignment is invoked.

Editing the Default Sending Borrowing Request Rule

When you edit the default sending borrowing request rule, you can edit the name and description of the rule, and the system behavior when none of the configured sending borrowing rules take effect.

To edit the default sending borrowing request rule:

1 On the Sending Borrowing Request Rules list page, under **Default Rule**, click **Edit**. The Sending Borrowing Request Rules page opens.

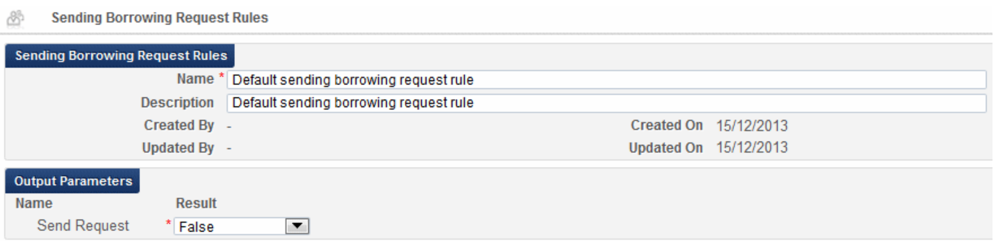


Figure 320: Sending Borrowing Request Rules Page – Default Rule

2 In the **Sending Borrowing Request Rules** section, modify the default rule name and description, if required.

3 In the **Send Request** field, modify the value, as needed.

- **True** indicates that if none of the configured rules take effect, the borrowing request is sent automatically.
- **False** indicates that if none of the configured rules take effect, the borrowing request is not sent.

4 Click **Save**.

Configuring Patron Query Templates

PERMISSIONS:

To configure patron query templates, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can configure queries to be sent to patrons using a template.

Patron query templates are configured on the PatronQueryTemplates Mapping Table page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Patron Query Templates**).

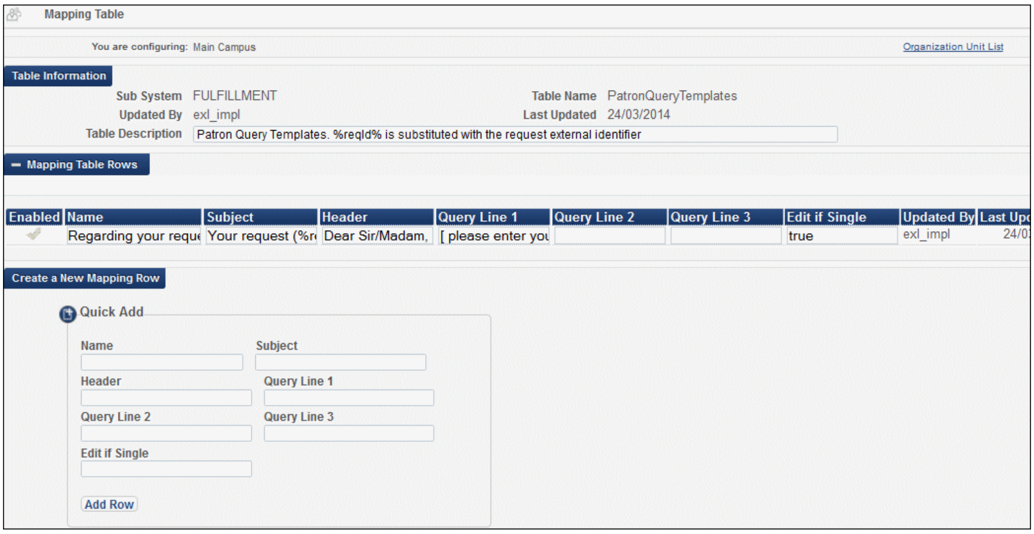


Figure 321: PatronQueryTemplates Mapping Table Page

The following actions can be performed on this page:

- Adding a patron query template (see **Adding Patron Query Templates** on page 379)
- Editing an patron query template (Modify the column values in the **Mapping Table Rows** section)

VIDEO:
For more information about configuring patron query templates, see the *ILL: Create Template for Query to Patron* video (7:25 mins).

Adding Patron Query Templates

You can add a patron query template.

To add a patron query template:

1. On the PatronQueryTemplates Mapping Table Page, locate the **Create a New Mapping Row** section and enter information in the displayed fields, as described in the following table:

Table 30. Patron Query Template Fields

Field	Description
Name	A descriptive name for the template.
Subject	The subject line of the query. The string **(%reqId)** is replaced with the request ID of the request

Table 30. Patron Query Template Fields

Field	Description
Header	The first line of the body of the query; typically a greeting.
Query Line 1	The first line of the query
Query Line 2	The second line of the query
Query Line 3	The third line of the query
Edit if Single	Relevant when only a single template displays in the table. Assign as **True** to open the E-Mail Message dialog box when clicking **Send Query to Patron** and enable editing the query contents before sending. Assign as **False** to send the query immediately upon clicking **Send Query to Patron**. For details on the Send Query to Patron option, see **Managing Resource Sharing Borrowing Requests** on page **128**.

2 Click **Add Row** to add a new template.

3 Click **Save** to save the configured templates.

To edit existing templates, modify the columns in the **Mapping Table Rows** section. The columns are identical to the fields described in the above table.

Discovery Interface Display Logic

Alma allows you to configure the following aspects of Primo:

- Services that display in the Primo View It and Get It tabs (see **Configuring Display Logic Rules**).
- Labels that display in the Primo View It and Get It tabs (see **Configuring Labels**).
- Related records that display in the Primo View It tab (see **Configuring Services for Related Records**).

Configuring Display Logic Rules

PERMISSIONS:

To configure display logic rules, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

The display logic rules enable you to define the circumstances under which the following types of services are displayed or are not displayed in the Primo View It and Get It tabs:

- Digitization (Get It) – Request to have an item or part of an item scanned so that it can be viewed on a computer
- General electronic services (View It and/or Get It) – Links that can be created by an institution for any purpose
- General hold request (Get It) – Request to have an item held at a circulation desk when the holdings record has no items. For more information on general hold requests, see **Creating a General Hold Request** on page **25**.
- Request (Get It) – Alma offers the following types of request services:
  - Hold request – Request to have an item held at a circulation desk
  - Booking request – Request to reserve an item at a specific time
- Resource sharing request (Get It) – Request to retrieve an item from another institution when the patron's institution does not have the item
- DB service (View It) – Link to the native interface of a third-party database
- Full text (View It) – View the full text for an item online
- Selected full text (View It) – Links to full text (full text may not be available to all articles in the Journal)

Each display logic rule can be either enabled or disabled. By default, each new rule is enabled.

Display logic rules are applied to related titles in addition to the other titles displayed in the View It/Get It tabs.

You configure display logic rules on the Discovery Interface Display Logic page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Discovery Interface Display Logic > Display Logic Rules**).

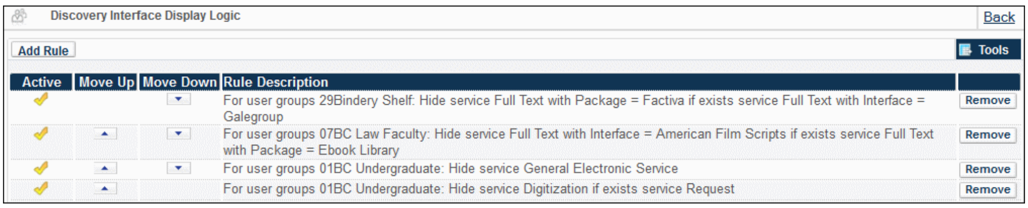


Figure 322: Discovery Interface Display Logic Page

NOTE:

Display logic rules can be configured at the institution level only. Select the required institution from the **You are configuring** filter on the Fulfillment Configuration page.

The following actions can be performed on this page:

- Adding display logic rules (see **Adding Display Logic Rules**, below)
- Disabling a display logic rule (click the yellow check mark to the left of the display logic rule. To enable a disabled display logic rule, click the relevant gray check mark .)
- Deleting display logic rules (**Actions > Remove**)

NOTE:
You cannot edit the parameters of an existing display logic rule. To modify any existing parameters, first delete the rule, and then add a new rule.

VIDEO:
See *Discovery Interface Display Logic* for a detailed Ask the Expert session on configuring discovery interface display logic.

NOTE:
For examples of working with discovery display logic, see *How to Work with Discovery Display Logic* (note that you must be logged in to the Documentation Center).

Adding Display Logic Rules

You can add a new display logic rule to an institution. The rules you add are available for all the libraries within the institution.

Each display logic rule can be either enabled or disabled. By default, each new rule is enabled.

To add a new display logic rule:

1 On the Discovery Interface Display Logic page, click the **Add Rule** button. The Add Rule dialog box opens.

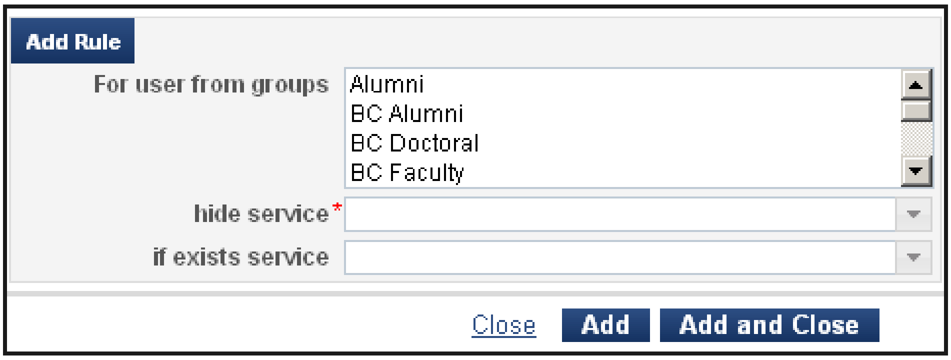


Figure 323: Add Rule Dialog Box

2 From the **For user from groups** list, select the group whose users are to be affected by the configured rule.

3 In the **Hide service** drop-down list, select the service to be hidden by the configured rule.

The fields displayed in the **Add Rule** window differ depending on your selection. Refer to the table below for information about the following fields:

- **with** – Depending on the service you want to hide, optionally select a type of service: package, interface, or service name.
- **with value** – Depending on the type of service, optionally enter a specific package, interface, or service name.

Table 31. Add Rule Fields

Hide	with	with value
Booking, Digitization, General Hold Request, Hold Request	N/A	N/A
DB Service	**Package**.	Search for and select a package name
	blank	No conditions apply to the service.

Table 31. Add Rule Fields

Hide	with	with value
Full Text, Selected Full Text	**Interface**	Search for and select an interface or a package name, respectively.
	Package	
	blank	No conditions apply to the service.
General Electronic Service	**Service**	Select a general electronic service from the drop-down list.
	blank	No conditions apply to the service.
Resource Sharing Request	**Availability by the campus**	Select **true** if you want to hide the service if the resource is available on campus. Otherwise, select **false**.
	Availability by the institution	Select **true** if you want to hide the service if the resource is available at the institution. Otherwise, select **false**.
	Ownership by the campus	Select **true** if you want to hide the service if the resource is owned by the campus. Otherwise, select **false**.
	Ownership by the institution	Select **true** if you want to hide the service if the resource is owned by the institution. Otherwise, select **false**.
	Resource Sharing System	Select a resource sharing system from the drop-down list.
	blank	No conditions apply to the service.

NOTE:

If you select to hide the **Full Text** or **Selected Full Text** services and select **Interface** from the **with** drop-down list, both CZ and local interfaces are available for selection under **with value**.

4 In the **If exists service** drop-down list, select a condition (such as the existence of another service) upon which to hide a service.

The fields displayed in the **Add Rule** window differ depending on your selection. Refer to the table above for information about the following fields:

- **with** – Depending on the service, optionally select a type of service: package, interface, or service name.
- **with value** – Depending on the type of service, optionally enter a specific package, interface, or service name.

NOTE:
For resource sharing requests, if a resource has holdings without items, it is not considered self-owned. To hide resources that have holdings without items, select to hide the **Resource Sharing Request** service if the **General Hold Request** service exists.

5 Click one of the following buttons to add your rule:

- **Add**: Adds the rule but leaves the dialog box open so that you can add additional rules
- **Add and Close**: Adds the rule and closes the dialog box

6 If you have defined more than one rule, on the Discovery Interface Display Logic page, use the **Move Up** and **Move Down** arrows to set the order of the rules. The system applies all the enabled rules in the order that you configure on this page.

NOTE:
You can click the gray/yellow check mark to the left of the rule to enable/disable it.

Display Logic Rule Examples

The following rule hides the display of EBSCOhost Academic Search Premier if the service page will include/display any full text from EBSCOhost.

NOTE:
EBSCOhost is identified as the interface in this example.

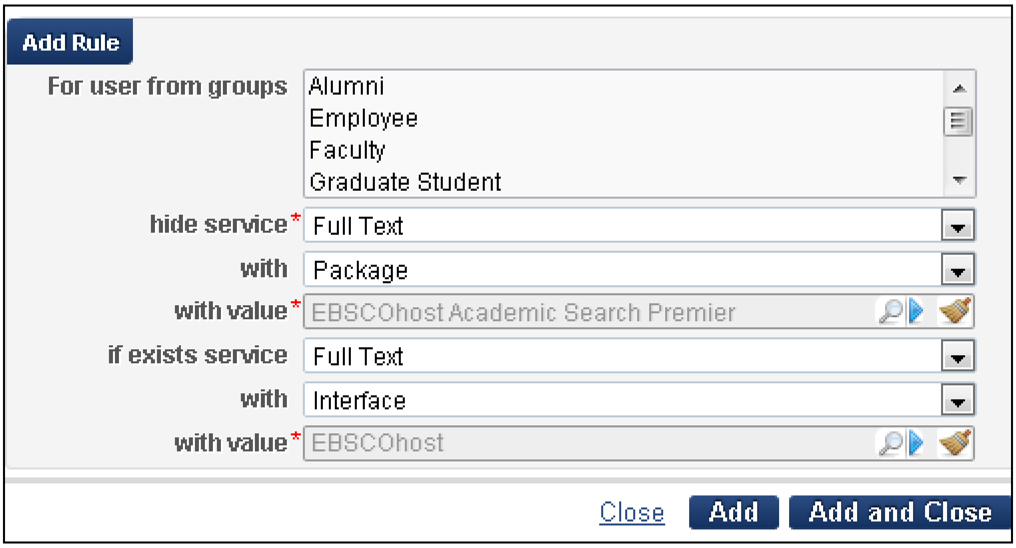


Figure 324: Example Display Logic Rule

The following rule specifies that if full text is available from any target (indicated by the blank options) and if the service page will include any full text from Factiva, hide the display of full text from Factiva.

NOTE:

Factiva is identified as the package in this example.

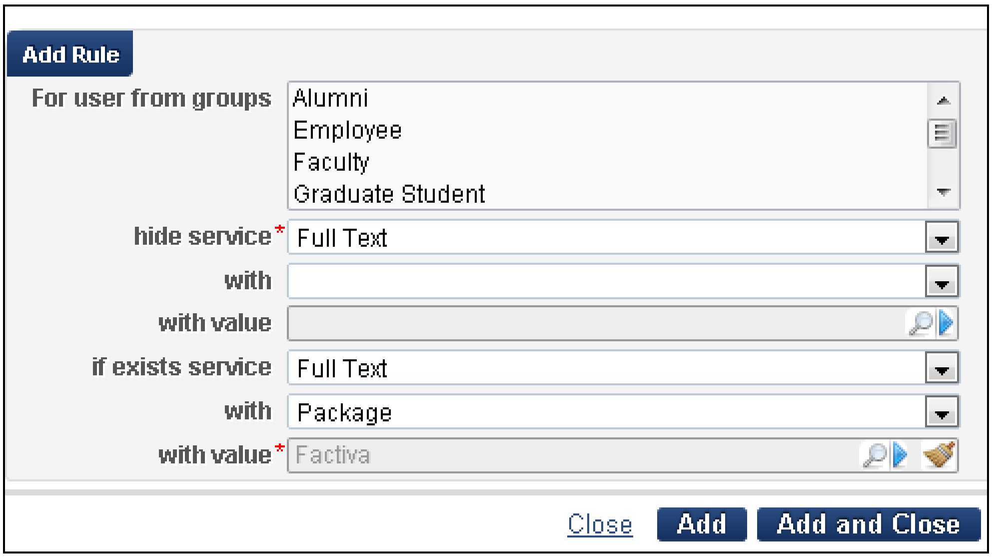


Figure 325: Example Display Logic Rule

Configuring Labels

PERMISSIONS:

To configure labels, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

The Discovery Interface Labels Code Table page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Discovery Interface Display Logic > Labels**) contains predefined labels that appear on the Get It and View It tabs in Primo. You cannot add or remove these labels, but you can edit the label's text to suit your requirements.

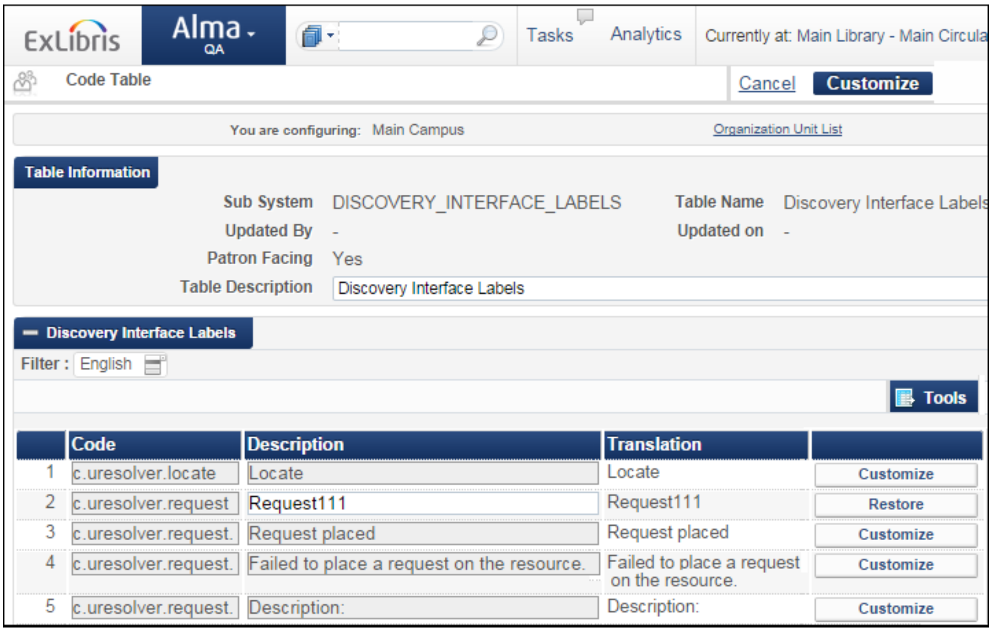


Figure 326: Labels Code Table Page (Displaying Partial List)

NOTES:

- Labels can be configured at the institution level only. Select the required institution from the **You are configuring** filter on the Fulfillment Configuration page.
- The **Enabled** column is not functional on this page and will be removed in an upcoming release.

You can perform the following actions on this page:

- Editing a label (see **Editing Labels**, below)

Editing Labels

You can edit the description of a label on the institution level. The institution-level configuration is applied to each library within the institution.

To edit a label:

1. On the Fulfillment Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu**), click **Labels** under **Discovery Interface Display Logic**.

   The Discovery Interface Labels Code Table page opens.

2. Click the **Customize** button to the right of the label that you want to edit and modify the text in the **Description** field.

3. Click **Customize** at the bottom of the page to store the modified labels in the system.

Configuring Services for Related Records

Services for electronic resources are relevant to end users for the following reasons:

- Articles sought may be available only in related versions of the journal.
- Metadata in the OpenURL can be for one publication, but in fact, a related journal by another name is what the end user sought.
- Vendors can list previous or newer versions in their holdings causing inconsistencies in the CKB. For example, the journal *Civil Engineering Systems* does not have full text, but it is followed by *Civil Engineering and Environmental*, which is available in full text.

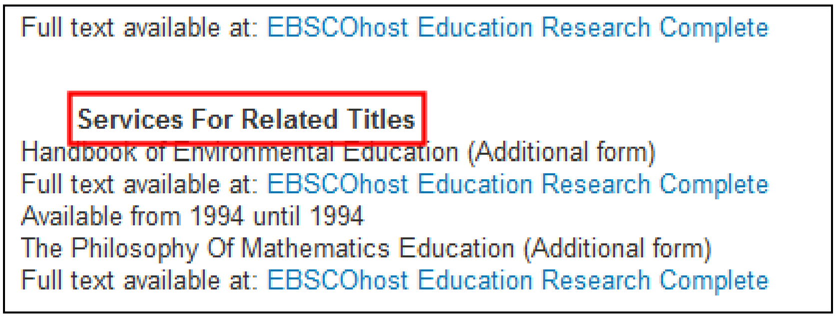


Figure 327: Related Records as Shown in the Primo View It Tab

The highlighted label in the above figure is controlled by the following code on the DISCOVERY_INTERFACE_LABELS code table page:

```
c.uresolver.ServicesForRelatedTitles
```

Labels used for each type of relation are listed in **Table 32**. For more information on labels, see **Configuring Labels**.

Figure 328: Relationship Labels as Shown in the Primo View It Tab

In the Primo View It tab, a distinction is made between the following types of relations:

- **Close relations** – If the record requested in the OpenURL has related records with close relations (that is the full text of the related record is identical or very close to the original record requested), services from the related record will be included in the View It tab with no indication that these are services for the related record. To the user, it seems as if these services are for the record sent in the OpenURL. Since the relation type is very close, it can be considered equivalent; and as far as the user is concerned, no distinction needs to be made. For a list of supported relations, see **Table 32**.

NOTE:

You can configure close relations to display in the same section as the remote relations in the Primo View It tab. For information, see the **Display closely related record services** option in **Enabling the Display of Related Records in the Primo View It Tab** on page **392**.

- **Remote relations** – For more distant relation types, the services of the related record are not displayed in the View It tab as regular services and display separately with an indication that these services are for a related record. For a list of supported relations, see **Table 32**.

To enable the display of related records, refer to **Enabling the Display of Related Records in the Primo View It Tab** on page **392**.

The following table shows the correlation between the MARC fields defined in the bibliographic record and the out-of-the-box labels that appear for each type of relation in the Primo View It or Get It tabs. The labels and information that appear in the Primo Details tab is determined by the normalization rules that are defined in the Primo Back Office.

Table 32. Related Record Types

Relation/Type	MARC Field	Location in Primo
Main series entry (remote)	7600# w, x	**View It tab**: c.uresolver.viewit.related_type_list.MAIN_SERIES = Main Series
Subseries entry (remote)	7620# w, x	**View It tab**: c.uresolver.viewit.related_type_list.SUBSERIES = Subseries
Original language entry (remote)	7650# w, x, z	**View It tab**: c.uresolver.viewit.related_type_list.ORIGINAL_LANGUAGE = Original Language
Translation entry (remote)	7670# w, x, z	**View It tab**: c.uresolver.viewit.related_type_list.TRANSLATION = Translation
Supplement entry (remote)	7700# w, x, z	**View It tab**: c.uresolver.viewit.related_type_list.SUPPLEMENT = Supplement
Supplement parent entry (remote)	77200 w, x, z	**View It tab**: c.uresolver.viewit.related_type_list.SUPPLEMENT_PARENT = Supplement Parent
Host item entry (close)	7730# w, x, z	**View It tab**: c.uresolver.viewit.related_type_list.CONTAINS = Contains **Get It tab**: c.uresolver.getit.related_title_display = Inventory of related ""{0}"" is listed below **Details tab**: Display/Is Part Of (defined in Primo normalization rules)
Constituent unit entry (close)	7740# w, x, z	**View It tab**: c.uresolver.viewit.related_type_list.PART_OF = Part Of
Other edition entry (remote)	7750# w, x, z	**View It tab**: c.uresolver.viewit.related_type_list.OTHER_EDITION = Other Edition
Additional physical form entry (remote)	7760# w, x, z	**View It tab**: c.uresolver.viewit.related_type_list.ADDITIONAL_FORM = Additional form
Issued with entry (remote)	7770# x	**View It tab**: c.uresolver.viewit.related_type_list.ISSUED_WITH = Issued With

Table 32. Related Record Types

Relation/Type	MARC Field	Location in Primo
Preceding entry (remote)	78000 w, x, z 78001 w, x, z 78002 w, x, z 78003 w, x, z 78004 w, x, z 78005 w, x, z 78006 w, x, z 78007 w, x, z	**View It tab**: c.uresolver.viewit.related_type_list.PRECEDES = Precedes **Details tab**: Display/Relation – Related Titles: Earlier Title (defined in Primo normalization rules)
Succeeding entry (remote)	78500 w, x, z 78501 w, x, z 78502 w, x, z 78503 w, x, z 78504 w, x, z 78505 w, x, z 78506 w, x, z 78507 w, x, z 78508 w, x, z	**View It tab**: c.uresolver.viewit.related_type_list.SUCCEEDS = Succeeds **Details tab**: Display/Relation – Related Titles : Later Title (defined in Primo normalization rules)
Other relationship entry (remote)	7870# w, x, z	**View It tab**: c.uresolver.viewit.related_type_list.OTHER_RELATIONSHIP = Other Relationship
Valid ISBN, ISSN, or other standard number (remote)	020 a, e 022 a, e 024 a	**View It tab**: c.uresolver.viewit.related_type_list.REPLACED_BY = Replaced By
Cancelled/invalid ISBN, ISSN, or other standard number (remote)	020 z 022 y, z 024 z	**View It tab**: c.uresolver.viewit.related_type_list.REPLACES = Replaces
Linking ISSN (remote)	022 l	**View It tab**: c.uresolver.viewit.related_type_list.LINKS_TO = Links To

For more information about configuring related records, see *How to Work with Discovery Display Logic for Related Records* (in the Documentation Center).

Enabling the Display of Related Records in the Primo View It Tab

PERMISSIONS:

To configure related records, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

The Related Record Services Configuration page allows you to configure the electronic services for related titles that display in the Primo View It tab.

To enable related record services:

1 On the Fulfillment Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu**), click **Related Records** under **Discovery Interface Display Logic**.

The Related Record Services Configuration page opens.

Figure 329: Related Record Services Configuration Page

2 For **Enabled related record services**, select **Yes** to enabled the features and make other selections needed. Refer to the following table.

Table 33. Related Record Services Options

Parameter	Description
Display related services if full text is available	Select this option to display services for related records if full text is available. Services for related records will not be shown if there is a full-text service for the original record in the OpenURL.
Display related services for serials	Select this option to include related services for serials.
Display related services for monographs	Select this option to include related services for monographs.

Table 33. Related Record Services Options

Parameter	Description
Deduplicate electronic collection services	Use deduplication of electronic collection services for remote related services. This will show only one service if related records are associated with the same electronic collection.
Enable direct link for related services	The direct-linking feature will be turned on/off according to this selection.
Display closely related record services	Select how closely-related services (which are defined with MARC 773 or 774 fields in the bibliographic record) should be displayed: ■ With no indication that these services are for related records ■ Separately from regular services with an indication that these services are for related records

3 Click **Save**.

Configuring Direct Linking

PERMISSIONS:

To configure direct linking, you must have the following role:

- Fulfillment Administrator

Direct linking allows users to view an electronic service (such as full text) immediately in the View It tab instead of having to click the service's link in the View It tab. If the OpenURL context object contains multiple electronic services, Alma's link resolver will display the first electronic service in the list (if the multiple services option is enabled).

NOTE:

If a search is performed with a non-Primo discovery system and direct linking is enabled, Alma's link resolver displays the electronic service directly, bypassing Primo's services page.

You configure direct linking on the Direct Linking Configuration page (**Fulfillment** > **Fulfillment Configuration** > **Configuration Menu > Discovery Interface Display Logic > Direct Linking**). The Direct Linking Configuration page allows you to enable direct linking and to specify situations in which direct linking is to be overridden if enabled.

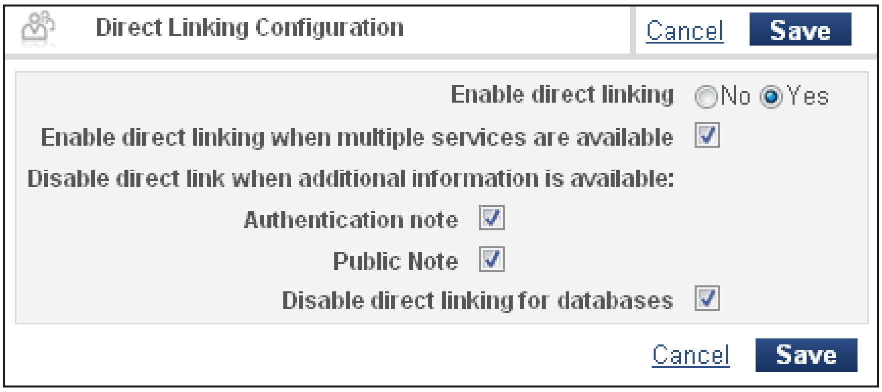


Figure 330: Direct Linking Configuration Page

NOTE:
Direct linking can be configured at the institution level only. Select the required institution from the **You are configuring** filter on the Fulfillment Configuration page.

To configure direct linking:

1 On the Direct Linking Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Discovery Interface Display Logic > Direct Linking**), select **Yes** from the **Enable direct linking** field to enable direct linking.

Selecting **No** indicates that the electronic service is accessed via a link in Primo View It tab or on the Alma UResolver Screen page.

Selecting **Yes** enables the other fields to be configured.

2 Configure the other fields, which allow you to control direct linking based on the search results:

- **Enable direct linking when multiple services are available** – enables direct linking even if more than one electronic service is returned in your search.
- **Disable direct linking when additional information is available** – The following options allow you to disable direct linking when additional information is returned:
  - **Authentication note** – disables direct linking when services contain an authentication note
  - **Public note** – disables direct linking when services contain a public note
  - **Disable direct linking for databases** – disables direct linking when the search results return a database

- **Disable direct linking for digital resources** – disables direct linking when the search results return a digital resource

3 Click **Save**.

Configuring General Electronic Services

PERMISSIONS:

To configure general electronic services, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

For information on configuring electronic services, see **Adding a General Electronic Service** in the *Alma-Primo Integration Guide*.

Configuring Online Services Order

PERMISSIONS:

To configure the order of online services, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can configure the services that are to display at the top and bottom of the services results list in the View It tab. The top service defined can also be used by Primo's direct linking option, from the search result record.

You configure the online services order on the Online Services Order page:

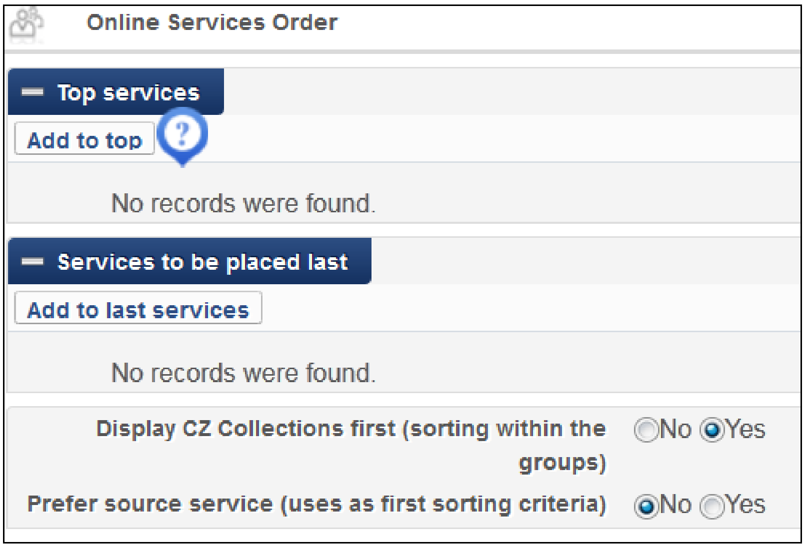


Figure 331: Online Services Order Page

NOTE:
The online services order can be configured at the institution level only. Select the required institution from the **You are configuring** filter on the Fulfillment Configuration page.

To configure the display order of services:

1. On the **Online Services Order** page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Discovery Interface Display Logic > Online Services Order**), click **Add To Top** to configure the order of services at the top of the list of results. The Add To Top dialog box opens.

Figure 332: Add To Top Dialog Box

When configuring the order of services at the bottom of the list of results, click **Add to Last Services**. The Add to Last Services dialog box opens, displaying the same fields as the Add to Top dialog box.

2. In the **Service type** field, select the service type. Select from:
   - DB Service

- Full Text
- Selected Full Text

3 In the **Service name** field, select the name for the selected service type. The **Service value** field displays.

4 In the **Service value** field, browse and select a service value. Click **Add** to add the service and enable adding another service, or click **Add and Close** to add the service and close the dialog box. The services are displayed on the Online Services Order page.

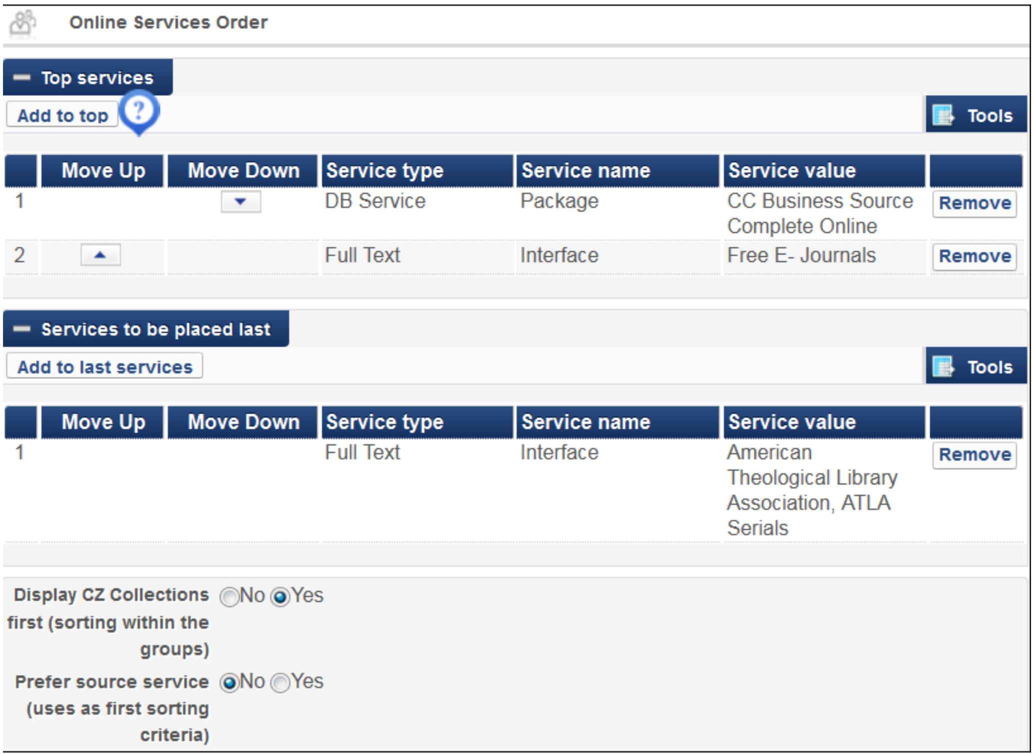


Figure 333: Online Services Order Page with Results

You can specify the exact sequence of services to be displayed by clicking the arrows in the **Move Up** and **Move Down** columns.

5 In the **Display CZ collections first** field, select one of the following options:

- **Yes** – The online resources will be sorted alphabetically per level (top, unspecified, and last). In addition, CZ resources will be alphabetized and listed first in each level.
- **No** – The online resources will be sorted alphabetically per level (top, unspecified, and last) only. Priority will not be given to CZ resources.

NOTE:

You can also set this priority via the **uresolver_display_cz_records_first** parameter in the CustomerParameters mapping table. For more information, see **Configuring Other Settings** on page **406**.

6 In the **Prefer source service** field, select one of the following options:

- **Yes** – Improves the sorting relevance of online resources offered by the Alma Services Page for OpenURLs coming from Primo Central. This option places the highest priority on services that match the source of the OpenURL. For example, if a user searching Primo Central discovers an article from Gale and the Alma link resolver can offer services from Gale and EBSCO, Alma will place the service from Gale at the top of the results, followed by the remaining electronic services as defined in the sort settings for this page. This is the recommended option.
- **No** – Sorting is unaffected. The electronic services are sorted as defined in the sort settings for this page.

NOTE:

You can also set this priority via the **uresolver_use_source_to_target_ordering** parameter in the CustomerParameters mapping table. For more information, see **Configuring Other Settings** on page **406**.

IMPORTANT:

If a service has been hidden via the display logic rules, it will not display regardless of this option.

Configuring General Electronic Services Order

PERMISSIONS:

To configure the order of general electronic services, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Configuring the general electronic services order dictates the display order of the list of general electronic services. You can configure specific services to appear at the top and bottom of the list and specify the order of the top and bottom lists of services.

You configure the order of general electronic services on the General Electronic Services Order page:

Figure 334: General Electronic Services Order Page

NOTE:
The order of general electronic services can be configured at the institution level only. Select the required institution from the **You are configuring** filter on the Fulfillment Configuration page.

To configure the display order of general electronic services:

1 On the **General Electronic Services Order** page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Discovery Interface Display Logic > General Electronic Services Order**), click **Add To Top** to configure the order of services at the top of the list of results. The Add To Top dialog box opens.

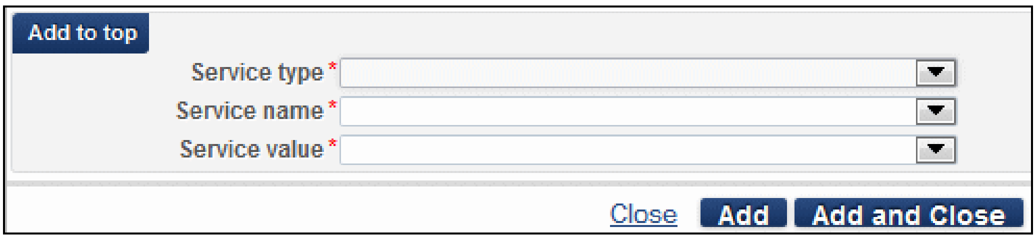


Figure 335: Add To Top Dialog Box

If you want a specific services to appear at the bottom of the list, click **Add to Last Services**. The Add to Last Services dialog box opens, displaying the same fields as the Add to Top dialog box.

2 In the **Service type** field, select **General Electronic Service**.

3. In the **Service name** field, select the name for the selected service type. The **Service value** field displays.
4. In the **Service value** field, browse and select a service value. Click **Add** to add the service and enable adding another service, or click **Add and Close** to add the service and close the dialog box. The services are displayed on the General Electronic Services Order page.

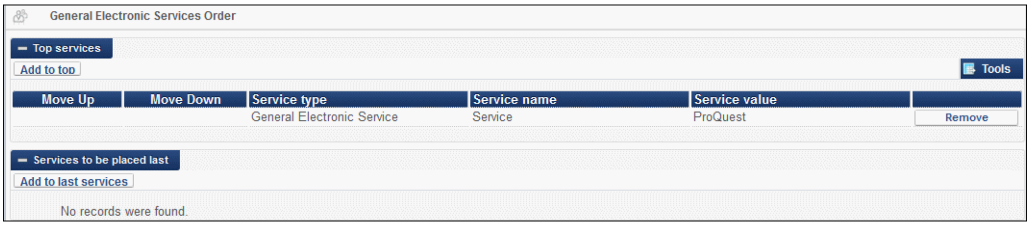


Figure 336: General Electronic Services Order Page with Results

You can specify the exact sequence of services to be displayed by clicking the arrows in the **Move Up** and **Move Down** columns.

Configuring Locations Ordering Profiles

PERMISSIONS:

To configure locations ordering profiles, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You create a locations ordering profile to determine the holdings locations display in Primo search results. Holdings locations are displayed in one of the following ways:

- According to the holdings' location and its proximity to the patron (the locations in the libraries closest to the patron are displayed at the top of the holdings list).
- According to the holdings' availability, regardless of proximity to the patron. When this option is chosen, locations are displayed in the following order:
  - holdings in temporary locations
  - holdings in permanent locations
  - holdings in remote locations

You configure locations ordering profiles on the Locations Ordering Profile page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Discovery Interface Display Logic > Locations Ordering Profile**).

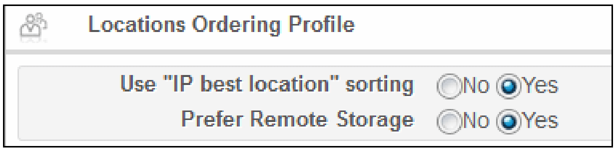


Figure 337: Locations Ordering Profile Page

NOTE:
Locations ordering profiles can be configured at the institution level only. Select the required institution from the **You are configuring** filter on the Fulfillment Configuration page.

To configure a locations ordering profile:

1 On the Locations Ordering Profile page, select **Yes** in the Use **"IP best location" sorting** field to configure display of holdings by location (and indicate that IP addresses must be defined for the libraries).

   No indicates that holdings are displayed by availability and that for the display of holdings locations, IP addresses do not need to be defined.

NOTE:
The default value is **No**.

   IP addresses can be configured:

   - On the library level (see **Adding/Editing IP Definitions for a Library** in the *Alma Administration Guide*)
   - On the campus level (see **Editing a Campus** in the *Alma Administration Guide*)

2 In the **Prefer remote storage** field, select **Yes** to assign priority to remote storage items when viewing results in the Get It tab, publishing to Primo, or the Primo RTA.

3 Click **Save**.

General

Configuring Fulfillment Jobs

PERMISSIONS:

To configure fulfillment jobs, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

When configuring fulfillment jobs, you configure the following:

- **Borrowing Activity Report Job** – Provides information on patron loans, overdue items, and any fines/fees that patrons may owe.
- **Send Courtesy Notices and Handle Loans Renewal Job** – Does one of the following:
  - If an automatic loan renewal rule is met – Performs automatic renewal for an item
  - If an automatic loan renewal rule is not met – Sends a courtesy notice informing the patron that the item is due

    A courtesy notice is also sent if a block exists on the patron or item, preventing item renewal (see **Configuring Block Preferences** on page **303**)

  For details on configuring automatic loan renewal rules, see **Configuring Automatic Loan Renewal Rules** on page **306**.

  For details on the **Notifications - Send Courtesy Notices and Handle Loan Renewals** job, see the relevant entry in the **Scheduled Jobs** table in the *Alma Administration Guide*.
- **Send Overdue Notices Job** – Sends a daily notice with a list of patron's loans due on the current day. You can configure when you want the notice to be sent.
- **Anonymization Job** – Configures the parameters to be invoked when running the **Fulfillment – Handle Historical Archiving** job, as follows:
  - Select **Anonymize item loans** to hide user information in completed loans. Note that loans with open fines/fees cannot be anonymized.
  - Select **Anonymize resource sharing requests** to hide user information in resource sharing requests.

  For details on how anonymization is handled within Alma after this job is run, see **To configure the Anonymization job:**, below.

For details on letters that Alma sends to patrons with these jobs, see **Configuring Alma Letters** in the *Alma Administration Guide*.

VIDEO:

Learn about how to regularly schedule Borrowing Activity Reports in the *Schedule Patron Activity Report* video (4:17 mins). Note that you need to be logged in to the Documentation Center in order to view this video.

Alma enables you to configure fulfillment jobs on the Fulfillment Jobs Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu > General > Fulfillment Jobs Configuration**).

Figure 338: Fulfillment Jobs Configuration Page

NOTE:

Fulfillment jobs can be configured at the institution level only. Select the required institution from the **You are configuring** filter on the Fulfillment Configuration page.

To configure the Borrowing Activity Report job:

1. In the **Status** field, select whether to activate the job.
2. In the **Schedule** field, select the time for the job to run. Choose from the following:
   - Not scheduled
   - On the 02 of every month
   - Every Monday

NOTE:

The time displayed depends on the time zone in which the institution is located.

You can run the job immediately by clicking the **Run Now** button.

3. Click **Save**. The updated job displays on the **Monitor Jobs** page (**Administration > Manage Jobs > Monitor Jobs**, locate the **Notifications – Send Periodic Fulfillment Activity Report** entry).

To configure the Send Courtesy Notices and Handle Loans Renewal job:

1 In the **Days before due date** field, enter the number of days before the loan's due date that a reminder notice is sent or that the loan is automatically renewed.

NOTE:
This setting can also be configured on the **Fulfillment Configuration > Configuration Menu > General > Other Settings Mapping Table** page. Modify the **auto_renew_loan_days** parameter value (see **Configuring Other Settings**, below).

This job also runs on loans created after the previous running of the job and whose due date is earlier than the number of days configured in the **Days Before Due Date** parameter.

For example:

- Job runs on **June 10**
- Days before due date = **7**

Loans with a due date of June 17 are covered by the job

- Job runs again on **June 11**
- Days before due date = **7**

Loans with a due date of June 18 are covered by the job.

However, if a loan was created on June 11 and is due on June 17, that loan is also covered by the June 11 job, since it was not covered by the previous day's job.

2 Click **Save**. The updated job displays on the **Monitor Jobs** page (**Administration > Manage Jobs > Monitor Jobs**, locate the **Notifications – Send Courtesy Notices and Handle Loan Renewals** entry).

To configure the Send Overdue Notices job:

1 In the **Overdue notice schedule** field, select the time at which you want to run the job.

2 Click **Save**. The updated job displays on the **Monitor Jobs** page (**Administration > Manage Jobs > Monitor Jobs**, locate the **Notifications – Send Due Date Reminders** entry).

To configure the Anonymization job:

1. Select **Anonymize item loans** to enable hiding user information in completed loans. Note that loans with open fines/fees cannot be anonymized.
2. Select **Anonymize resource sharing requests** to enable hiding user information in resource sharing requests.

NOTE:
The **Schedule** field in this section is read-only and cannot be configured.

---

3. Click **Save**. The updated job displays on the **Monitor Jobs** page (**Administration > Manage Jobs > Monitor Jobs**, locate the **Fulfillment – Handle Historical Archiving** entry).

When the job runs, the Borrower Name and Borrower ID are removed from the item history of all loaned items. For example, before the job runs, the Borrower Name and Borrower ID are displayed:

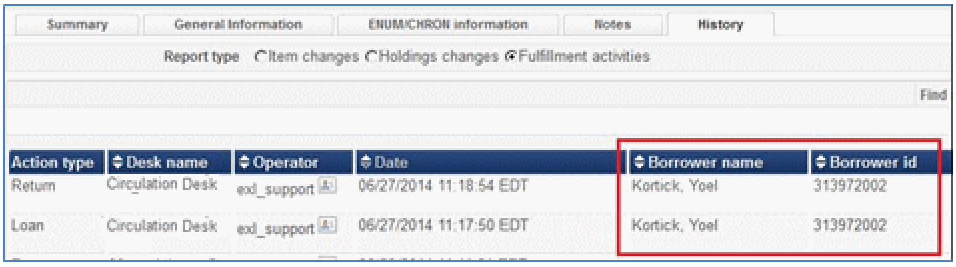


Figure 339: Loan History

After the job runs, the Borrower Name and Borrower ID are not displayed:

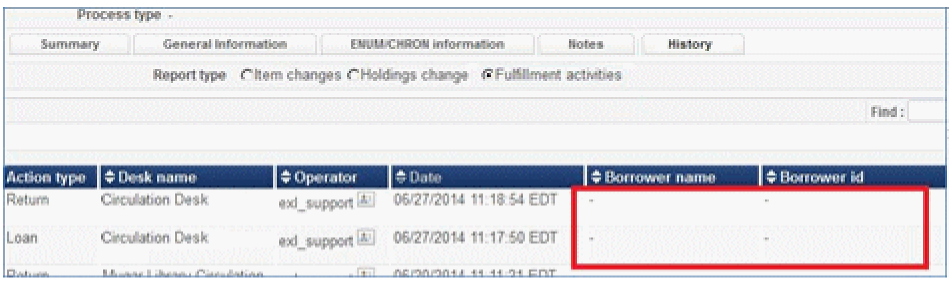


Figure 340: Loan History After Anonymization

For anonymization to occur in Alma Analytics, first the Handle Historical Archiving job must be run and then the ETL must occur. After anonymization, none of the user details are displayed in Analytics; however, the following information is displayed:

- Patron Details > Patron group (called **User Group** in Alma)
- Patron Details > Patron job title (called **Job Category** in Alma)
- Patron Details > Record type (**Public**, **Staff**, or **Contact**)
- Patron Details > Account type (**Internal** or **External**)

Barcode	Date Key	User Id	User Name	User Group	First Name	Last Name	Patron Group	Patron Id	Patron Job Title	Patron Record Type	Patron Type
11719013765864	6/27/2014	-1	None				staff member, library	-1	GeneralAdministrator	Staff	Internal

Figure 341: Analytics After Anonymization

Configuring Other Settings

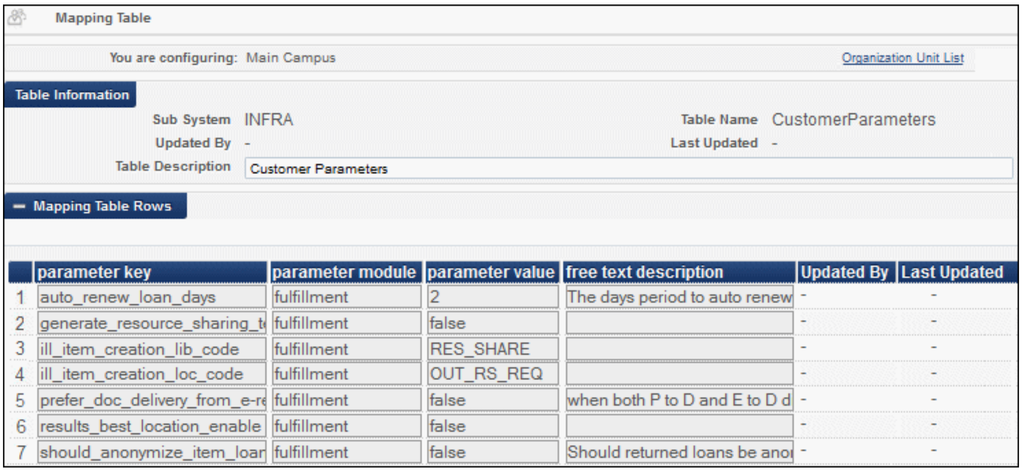
PERMISSIONS:

To configure other settings, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

This option enables you to customize settings that are not specific to any other fulfillment action. These other settings can be configured on the institution level only.

You configure other settings on the Customer Parameters Mapping Table page (**Fulfillment > Fulfillment Configuration > General > Other Settings**).



	parameter key	parameter module	parameter value	free text description	Updated By	Last Updated
1	auto_renew_loan_days	fulfillment	2	The days period to auto renew	-	-
2	generate_resource_sharing_t	fulfillment	false		-	-
3	ill_item_creation_lib_code	fulfillment	RES_SHARE		-	-
4	ill_item_creation_loc_code	fulfillment	OUT_RS_REQ		-	-
5	prefer_doc_delivery_from_e-re	fulfillment	false	when both P to D and E to D d	-	-
6	results_best_location_enable	fulfillment	false		-	-
7	should_anonymize_item_loar	fulfillment	false	Should returned loans be anoi	-	-

Figure 342: Mapping Table Page – Other Settings

NOTE:
Other settings can be configured at the institution level only. Select the required institution from the **You are configuring** filter on the Fulfillment Configuration page.

The following table describes the **Other Settings** options:

Table 34. Other Settings Options

Parameter Key	Description
auto_renew_loan_days	Indicate the number of days before a loan is due that automatic renewal is attempted by Alma.
check_self_ownership_serial	Indicate **True** to enable self-ownership checks to be performed for serial titles; the **Resource Sharing** link is hidden in the Get It/View It tabs in Primo. When indicating **False**, self-ownership checks are not performed for serial titles, and the **Resource Sharing** link displays in Primo whether or not the serial is self-owned.
course_restricted_bib data_will_be_deleted	Indicate **True** to delete a bibliographic record that is created as course restricted when the course is deactivated. If it is not deleted, it is suppressed from publication.
demerit_enable	Indicate **True** to enable demerit functionality. For more information, see **Enabling the Demerit System**.
demerit_history_days	Specify the length of the demerit tracking period in days. If the user's demerit points exceed the value specified in the **demerit_maximum_threshold** parameter during the demerit tracking period (that is the last number of days specified by this parameter), the system places a block on the user. For more information, see **Enabling the Demerit System**.
demerit_maximum_threshold	Specify the maximum number of points allowed during the tracking period. For more information, see **Enabling the Demerit System**.
demerit_suspension_days	Specify the length of a user's suspension period in days. For more information, see **Enabling the Demerit System**.
email_partner_configurable_ line1	Not currently supported
email_partner_configurable_ line2	Not currently supported
enable_request_during_loan_ for_different_ policy	Indicate **True** to enable patrons to request an item belonging to a bibliographic record for which the patron already has an item on loan.

Table 34. Other Settings Options

Parameter Key	Description
generate_resource_sharing_temp_barcode	Indicates whether the resource sharing library can use an automatically generated temporary barcode to receive and circulate a borrowed item. The barcode is based on the resource sharing request's external identifier (see the **External identifier** field in **Table 11**).
generate_temporary_barcode	Indicates whether to use the default barcode generation when borrowing items.
ignore_lender_due_date	Indicate **True** to ignore a request's due date when loaning an item to a patron. The due date is instead calculated according to the TOU defined in the fulfillment unit.
ill_item_creation_lib_code	The default code of the library in which to create the temporary items for resource sharing. When working with multicampus libraries, leave this value blank and assign a resource sharing library in the patron record.
ill_item_creation_loc_code	The default code of the location in which to create the temporary items for resource sharing. When working with multicampus libraries, leave this value blank and do the following: ■ Assign a resource sharing library in the patron record. ■ Configure a default location for borrowing when configuring resource sharing information for a library (see the **To configure resource sharing library information:** section in **Configuring Libraries** on page **237**.
overdue_at_claim_return_loan	Indicate **false** if you want to disregard overdue fines for items that were claimed to be returned. Otherwise, set to **true** to create charges for overdue fines.
overdue_at_lost_loan	Indicate **false** if you want to disregard overdue fines for items that were lost by the user. Otherwise, set to **true** to create charges for overdue fines
prefer_doc_delivery_from_e-resources	Indicate **true** if you prefer to do digitization from electronic resource rather than from print resource when both exist.
primo_loan_list_sorting	Specify the order in which loans are sorted in Primo My Account > Loans. By default, the loans are listed in descending order by due date. The valid values are **ascending** and **descending**.

Table 34. Other Settings Options

Parameter Key	Description
remember_last_loan_display	Indicate **true** for the Patron Services page to display loans according to the last option selected by the operator (either all loans (**All**) or only those in the current session (**This session**)). When indicating **false**, only loans for the current session (**This session**) display.
results_best_location_enable	Indicate **true** to prioritize the results list according to your location when using Get It and RTA services.
rs_auto_request_lending	Indicate **true** to enable automatically locating incoming lending requests to match a lending request with an existing resource. The digitization department and pickup location for the resource are specified in the **rs_default_digitization_department** and **rs_default_pickup_location** parameters, respectively.
rs_default_digitization_department	Enter the name of the digitization department to which the resource that matches a lending request is to be moved.
rs_default_pickup_location	Enter the pickup location for the resource that matches the lending request, in the following format: <**library code.location code**>
rs_support_add_service	Indicate **True** for the **Alternative address** field to display on resource sharing request forms.
should_anonymize_borrowing_request	Indicate **True** to block viewing the patrons who have placed borrowing requests. Indicating **False** enables viewing this information.
should_anonymize_item_loan	Indicate **True** to block viewing the patrons who have borrowed returned items. Indicating **False** enables viewing this information.
should_anonymize_request	Indicate **True** to hide the requester ID in the request history details when a request is added to request history. When set to **False**, the requester ID appears.
uresolver_display_cz_records_first	Indicates whether to list CZ records first in each level in the list of online resources. For more information, see **Configuring Online Services Order** on page 395.
uresolver_use_source_to_target_ordering	Indicates whether to place the highest priority on services that match the source of the OpenURL. For more information, see **Configuring Online Services Order** on page 395.

Editing Other Settings

You can edit the table description and parameter values for two settings: when you want auto-renewal to be performed (the number of days before a loan period ends) and whether you prefer to deliver digitized documents from e-resources.

To edit other settings:

1. On the Mapping Table page, change the **Table Description** as required.
2. Under **Mapping Table Rows**, locate the parameter — `auto_renew_loan_days` and/or `prefer_doc_delivery_from_e-resources` — that you want to edit, and click **Customize**.
3. Modify the parameter value—the number of days or **True/False**—as required.

NOTE:
You can, at any time, click **Restore** to restore the initial parameter value.

4. Click **Save** to store the modified parameter values in the system.

Configuring Printers

PERMISSIONS:

To configure printers, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Alma is hosted in a SaaS environment. Due to security concerns and technical limitations, SaaS environments do not support direct connection of local or network printers. Instead, printing in Alma works via email. The email addresses of the local printers at every library and institution must be defined.

You configure printers on the Printers page (**Fulfillment > Fulfillment Configuration > Configuration Menu > General > Printers**).

Figure 343: Printers Page

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

On the Printers page, the following is displayed:

- a find option. Note the option to search printers by either of the **in** drop-down options—description and name.
- a list of printers

Click the printer code or name headings to sort the list alphabetically—in ascending or descending order—by printer code or name.

The following actions can be performed on this page:

- Adding a printer (see **Adding a Printer**, below)
- Editing a printer (see **Editing Printer Information** on page **412**)
- Deleting a printer (**Actions > Delete**)

Adding a Printer

You can add a printer to the institution or a library. If you add a printer to the institution, it is available for all the libraries within the institution as well.

NOTE:
Ensure that the email addresses of the printers you add are configured in the Email Include List mapping table. For instructions, see **Configuring Allowed Emails** in the *Alma Administration Guide*.

To add a printer:

1. On the Printers page, click the **Add Printer** button.
2. In the **Add Printer** dialog box, enter a code, name, and email address (all required) for the printer. Optionally, add a description as well.

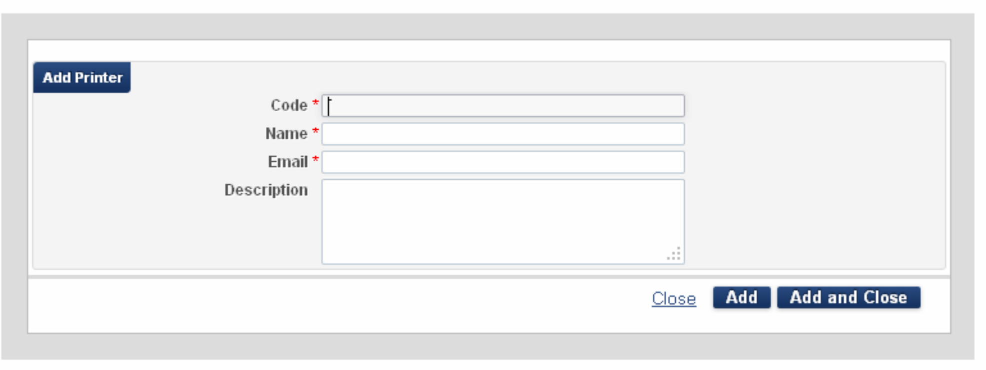


Figure 344: Add Printer Dialog Box

3 Click **Add and Close** to close the dialog box. The defined printer is added to the list of printers on the Printers page.

Figure 345: Printers Page

After defining a printer, you can specify which circulation desks and service units are served by the printer. For details, see **Editing Printer Information**, below.

Editing Printer Information

You can edit the details of any printer. The details include:

- General printer information
- Circulation desks and service units that are served by the printer

To edit printer information:

1. On the Printers page, in the **Code** column, click the printer code link, or select **Actions > Edit** for the specific printer record whose information you want to update. The Edit Printer page opens.

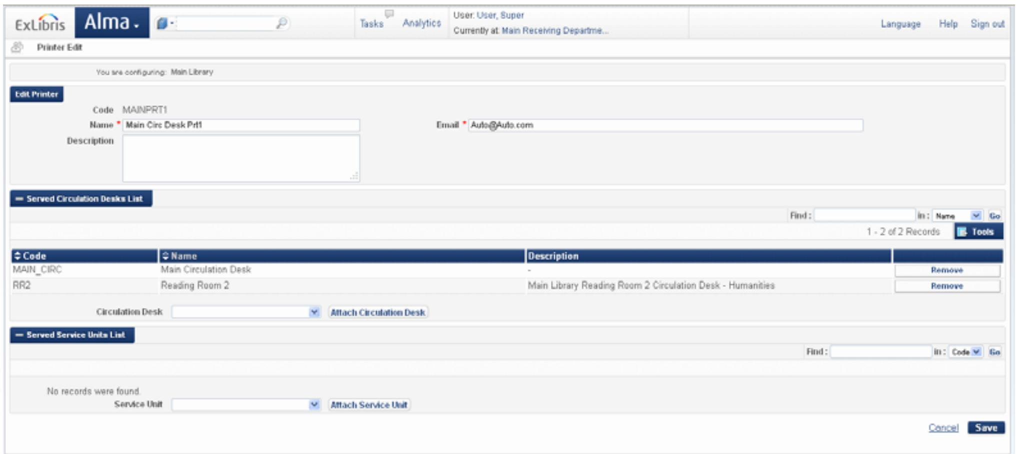


Figure 346: Edit Printer Page

2. Under **Edit Printer**, edit the general printer details as required.
3. Under **List of Served Circulation Desks**, select a circulation desk that is served by the printer, and click the **Attach Circulation Desk** button. The selected circulation desk is added to the list of circulation desks that are served by the printer.
4. Repeat the previous step for all circulation desks that are served by the printer.

NOTE:
To remove a circulation desk from the list of circulation desks that are served by the printer, click the **Remove** button to the right of the circulation desk.

5. Under **List of Served Service Units**, select the service unit that is served by the printer, and click the **Attach Service Unit** button. The selected service unit is added to the list of service units that are served by the printer.
6. Repeat the previous step for all service units that are served by the printer.

NOTE:
To remove a service unit from the list of service units that are served by the printer, click the **Remove** button to the right of the service unit to be removed.

7. Click **Save** to store your changes to the printer information.

Configuring Article and Book Form Mandatory Fields

PERMISSIONS:

To configure mandatory fields in article and book forms, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can designate specific fields as mandatory when configuring resource sharing requests. You can also group several fields together so that at least one of the fields is required to be completed when submitting resource sharing requests.

Fields can be assigned as mandatory for requests made for an article and/or a book.

NOTE:

The configured mandatory fields also appear as mandatory in the Primo resource sharing form, in reading list citation forms, and when cataloging brief records.

You configure mandatory fields for resource sharing request forms on the ArticleFormMandatoryFields Mapping Table and BookFormMandatoryFields Mapping Table pages (**Fulfillment > Fulfillment Configuration > Configuration Menu > General**, select **Article Form Mandatory Fields** or **Book Form Mandatory Fields**):

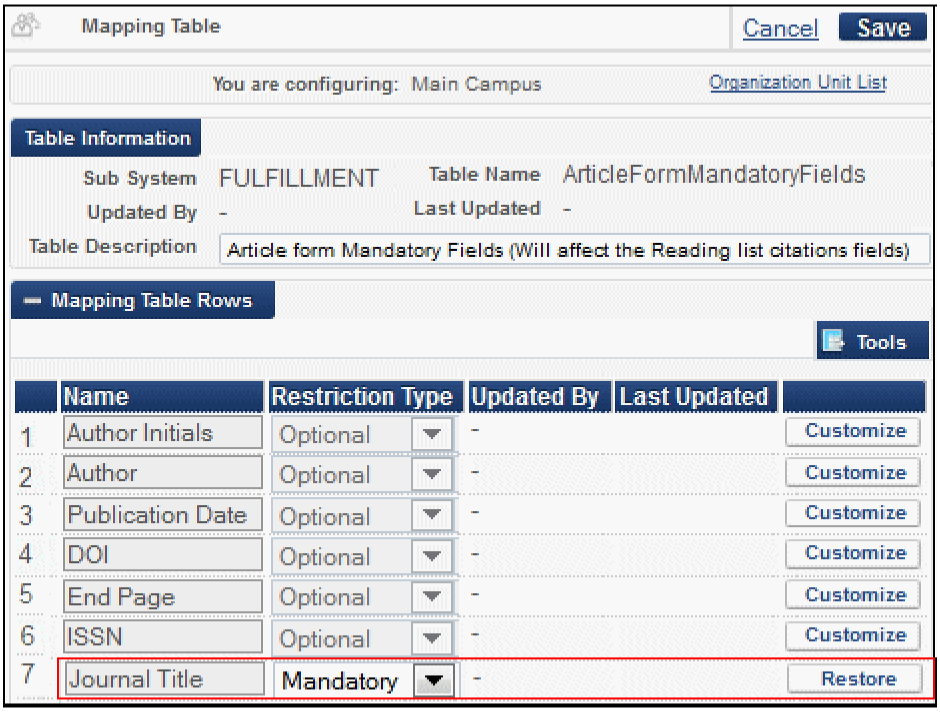


Figure 347: Mapping Table Page – Mandatory Fields

NOTE:
Ensure that you are within the context of the institution whose resource sharing library form mandatory fields you want to configure by selecting the required institution from the **You are configuring** filter on the Fulfillment Configuration page.

The following actions can be performed on this page:

- Configure mandatory fields for resource sharing request forms (see **To configure mandatory fields for resource sharing request forms:**, below)
- Configure a group of fields in which at least one of the fields is mandatory when configuring a resource sharing request (see **To configure a group in which one field is mandatory:** on page 417)

To configure mandatory fields for resource sharing request forms:

1. On the Mapping Table page for an article or a book, click **Customize** for the fields you want to be mandatory when configuring a resource sharing request.

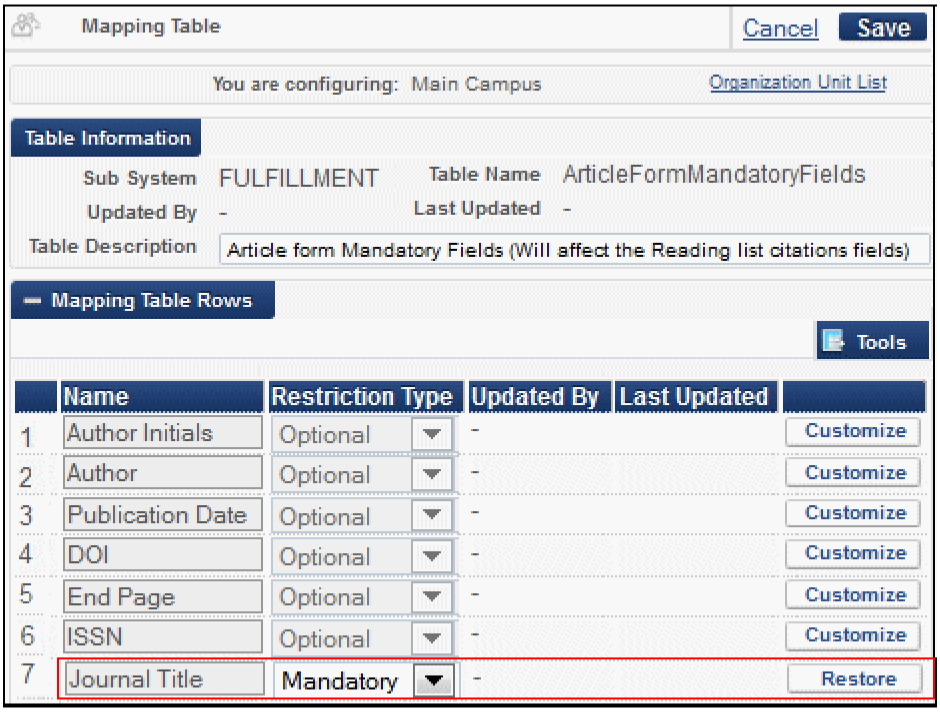


Figure 348: Mapping Table Page – Mandatory Fields

2. In the **Restriction Type** column, select **Mandatory**.

   To restore a field to its default value, click **Restore**.

3. Click **Save**. The indicated fields display as mandatory on the relevant Resource Sharing Lending Request or Resource Sharing Borrowing Request page.

To configure a group in which one field is mandatory:

1. On the Mapping Table page for an article or a book, click **Customize** for the fields you want to arrange into a group.

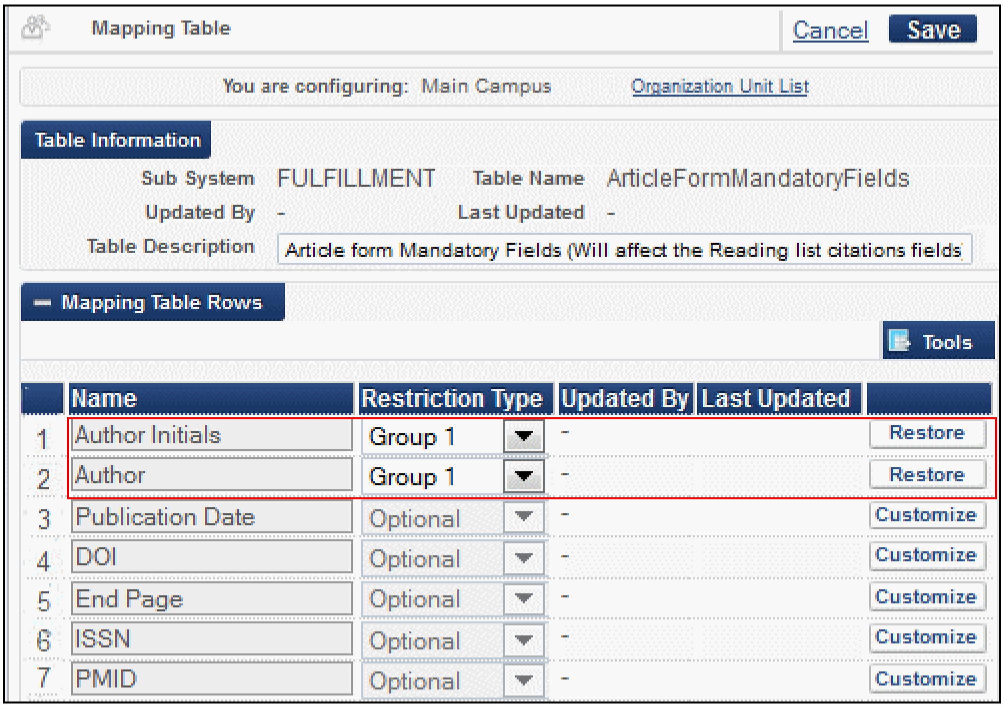


Figure 349: Mapping Table Page – Configuring Groups

2. In the **Restriction Type** column, select **Group 1** (or another group). The indicated fields belong to the same group.

   To restore a field to its default value, click **Restore**.

3. Click **Save**. At least one of the indicated fields must be configured on the relevant Resource Sharing Lending Request or Resource Sharing Borrowing Request page.

NOTE:

Fields in groups are not labeled with a red asterisk (as regular mandatory fields are), but if at least one of the fields in a group is not assigned a value, an error message displays.

You can configure up to five different groups.