Fulfillment 01: Library and Campus Management

There are four levels to Alma’s architecture: (1) collaboration-networks which contain (2) institutions which contain (3) libraries which contain (4) locations—such as the circulation desk.

The collaborative-network level allows for resource sharing, shared catalog, acquisitions and fulfillment networks, and sandbox management.

The institution level is the main building block and enables consolidated management of key workflows in addition to management of users, licenses, vendors, and metadata.

The ‘libraries’ level allows for separate management of fulfillment and acquisitions modules where appropriate. The locations of a library contain physical inventories.

You will manage the "library level" in Alma->configuration->fulfillment tab by selecting the library from the dropdown. Particularly, you must configure the General Details—like the library’s name—and the IP Definitions (these ip addresses are used for security purposes to establish locality) but there are other settings you will need to configure here as well.
As the institution level is the main building block, as you’ll see in the videos, most of the time the institution is selected in the dropdown pictured above.

**Fulfillment 02: Calendars**

The calendar function manages library hours of operation. Standard opening hours are defined at the library level, as are loan durations. The calendar function uses three types of calendar records-- ‘Standard opening hours’, ‘Events’ and ‘Exceptions.’ For example, one 'event' you might configure is a date for the end of term. To add this date record click the ‘add record’ button. This ‘event record’ will make a loan period end on a certain date.

There are two locations within Alma with which to configure calendar records-- one is under the Fulfillment tab and the other is under the General tab. For hours of operation go to the Fulfillment tab.

As pictured below, for events and exceptions to the hours of operation go to Alma configuration -> General Tab->"Add a library or edit library information" and then the “Calendar Management” sub-tab.
Both calendar management locations show the other location’s records.

**Fulfillment 03: Relationships**
Skipping the “Relationships” video on reciprocity between libraries as most campuses only have one library. Watch it if it applies to you.

**Fulfillment 04: Circulation Desks**
Spend time watching and digesting the circulation desk video.

Circulation desks are the service points for physical inventory. All inventory must be associated with a circulation desk even if it is non-circulating.

Circulation desk staff are configured individually at each desk and can have the following roles/privileges
In Alma configuration, under the Fulfillment tab, see the link for ‘Circulation Desks’ to add a desk, via a 5-step wizard, or to configure an existing desk.

<table>
<thead>
<tr>
<th>Role</th>
<th>Privileges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Circulation Desk Operator</td>
<td>Loans, returns, renewals, fines and fees, etc.</td>
</tr>
<tr>
<td>Circulation Desk Manager</td>
<td>All Operator privileges <em>plus</em> override blocks</td>
</tr>
<tr>
<td>Circulation Desk Operator - Limited</td>
<td>All Operator privileges <em>except</em> fines and fees.</td>
</tr>
<tr>
<td>Request Operator</td>
<td>Items for hold shelf or for transit</td>
</tr>
</tbody>
</table>

General details, receipt printers, hold shelves and other important values are determined during the configuration of circulation desks.
**Fulfillment 05: Printers**

Each departmental printer must have an associated email address so that Alma can print to it. Rather than poke a hole in the campus firewall and expose the printers’ factory default email address to outsiders, ExLibris recommends using a single print server to broker traffic to various printers. The most common print server software used is Automatic Email Manager by Nantuk. This is just an aside-- email address printing is not addressed in the videos.

To configure printers in Alma, visit the Fulfillment tab under configuration and then click the ‘printers’ link under the heading ‘General’. After clicking ‘add printer’ there are a few values that need to be entered, including the printer code, which value must be unique like butler-circ-printer1

![Alma Configuration](image)

Right-click a printer to edit its configuration.

**Fulfillment 06: Physical Locations**

Spend time watching this video.
Locations are the last level of the Alma architecture. They are owned by libraries and are defined by the inventories they contain (ie ‘International Collection’). Physical locations are configured via the Fulfillment tab.

Right-click a location to see its configuration form and the values entered here… values like 'location type’ (open, closed, remote) which impact discovery services and involve other considerations.

**Fulfillment 07: Fulfillment Units**

What the heck is a fulfillment unit you might ask?

Items in a location generally circulate the same way depending on the location policy, but there are exceptions, and item policies can be added to the location policy for that purpose.

Similarly, though moving in the opposite direction, there may be a need (ie life would be easier if…) for policies that span locations. This is where fulfillment units come into play. Fulfillment units are groupings of similar location types across libraries. For example, general-stacks-locations across multiple libraries at an institution can be grouped into a fulfillment unit.

Thus, fulfillment units are configured at the institution level; however, at a resource-sharing library, the fulfillment unit and fulfillment unit rules (terms of use or TOUs) are defined at the library level for general sanity.

Each fulfillment unit (say, Media) has its own fulfillment unit rules (media TOUs and policies)
Fulfillment Units | Fulfillment Rules
---|---
General Stacks | General Stacks TOUs and Policies
Media | Media TOUs and Policies
Course Reserves | Course Reserves TOUs and Policies

These rules are defined by combinations of user types, item types, and TOUs. Course Reserves may have a TOU for faculty of ‘no-loan’ and a TOU for students of 4 hours.

Carefully watch the part in fulfillment-units-07.mp4  (2:50/13:40) on configuring units and unit rules in Alma

Note: A location can be associated with only one fulfillment unit at a time.

**Fulfillment 08: Terms of Use and Policies**

Fulfillment units have TOUs. TOUs have policies. Pretty cut and dry. These policies are discussed in the video fulfillment-tou-08.mp4. You can watch the video but it may be better just to quickly scroll through and peruse the handout that ExLibris provides with their TOU Storyline video on their Alma Certification site.

**Fulfillment 09: Loan Renewals and Recalls**

Like fulfillment units, terms of use, and policies… Auto Loan Renewals are configured at the institution level under the fulfillment tab’s ‘Physical Fulfillment’ heading as pictured here:
Various renewal rules, for example, are created based on certain input criteria. These rules allow / prevent auto renewal. A default rule kicks in when no other rule applies. The default rule most likely has an output parameter set to “AutoRenewal=False” with all peremptory conditional rules before that set to AutoRenewal=True.

These renewal rules are then activated via Alma jobs which can automatically renew or email a patron a courtesy notice. You have to configure the job via the fulfillment jobs configuration link under the general heading of the fulfillment tab in Alma Config.

Related to the topic of auto-renewals is the topic of recalls, and you should fully digest the segment of the videos on recalls (6:36/8:52 of the fulfillment-loanrenewals-09.mp4 video)

**Fulfillment 10: Overdue and Lost Loan Profiles and Notification Letters**

The Overdue Profile optionally sends notifications, assesses fines per TOUs, blocks patrons, and registers the associated fees for these activities. The Overdue Profile does not change item statuses.

The Lost Profile automatically changes an item’s status and triggers letters based on the TOUs. This profile optionally assesses associated fees.

These two profiles are run by a regularly scheduled job in Alma. So, for these two profiles to be operable, you must enable the job by toggling a parameter (table value) in the
Configuration->Fulfillment->General->"Other Settings" mapping table. The key for this parameter is labeled as switch_to_overdue_and_lost_loan_new_job and must be set to ‘true’.

The Overdue and Lost (Loan) Profiles can be configured (at the institution level) via the Fulfillment tab->Overdue and Lost Loan Profiles under the Physical Fulfillment heading. Jump to 2:40/15:33 in the video fulfillment-letters-10.mp4 to see how these profiles are configured.

Letters… Like a letter merge in MS Word, the Alma system merges letter variables from its database into an XML file. The layout of this XML file is controlled by an XSL template.

The XML file has some default labels and text snippets like <<library_name>> that can be configured from within Alma.

To configure the job that automatically produces letters every night, see the “Fulfillment Job Configuration” link under General on the Fulfillment tab.

ExLibris does not support XSL file editing but the community does. These files will likely be shared in SUNY when improved. ExLibris will only reset the XSL file to the default if things go haywire.
Fulfillment 11: Loan Anonymization Rules

Anonymization removes data to ensure user privacy and permanently breaks ties between users, loans, requests, and fines and fees.

At the institution level anonymization rules determine when and how user data and records are anonymized but only if the records are inactive, not checked out etc.

Configuring “Loan Anonymization Rules” in Alma Configuration/Fulfillment tab is a good way to learn about how input and output parameters work within Alma rules, but it is most likely the defaults will not need much configuring. Alma rules are applied in the order in which the Rule Editor presents them. Once a rule applies the other rules are ignored. See below. The bottom rule is the default rule and it is used when no other rules above it apply to the record in question. In the default rule the output parameter is set to false so no anonymization occurs.

The job to run anonymization rules is also configured under the Fulfillment Jobs Configuration link.

Once data is anonymized, the analytics module no longer has access to the user id data, and, on the patron side of things, they can no longer see their previous loans.
Fulfillment 12: Patron Limits and Loan Limits
Watch the fulfillment-patronlimits-12.mp4 video as this will most likely need to be fully understood and configured at each institution.

Fulfillment 13: Block Preferences
Same with block preferences. fulfillment-blockpreferences-13.mp4

Fulfillment 14: Discovery - Direct Linking
Watch fulfillment-directlinking-14.mp4 as it describes part of how Alma works with Primo. This video and all the discovery videos, involve the patron experience and are thus important. They are not long and are actually followable, having mostly to do with interfaces and labels, something we all love to think about.

Fulfillment 15: Discovery - Labels, Licenses, and Related Records

Fulfillment 16: Discovery - Display Logic Rules

Fulfillment 17: Discovery - General Electronic Services

Fulfillment 18: Other Settings
This is the last video in the Alma Cert Fulfillment module https://knowledge.exlibrisgroup.com/Alma/Training/Alma_Administration_Certification/Fulfillment

But it may be best to watch it first, and so, in this course, it's been placed as the first video in the first subfolder. Most all the configurations discussed in the fulfillment videos have a direct link in the Alma configuration->Fulfillment interface. For those that don’t go, they go into the Mapping table. So the mapping table is an important concept.