Alma Fulfillment Infrastructure

Fulfillment User Roles

- Fulfillment administrator
- Fulfillment services manager
- Circulation desk manager
- Course reserves manager
- Resource sharing partners manager
- Circulation desk operator and limited
- Course reserves operator
- Fulfillment services operator
- Instructor
- Requests operator
- Work order operator

Underlying Infrastructure

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Institution

Each Alma institution is established with one or more libraries

Institution details include:

- General information
- Library details
- Contact information
- Calendar details (global)

Libraries

Organization Unit Name ▲	Description	Organization Unit Type	Path ⬍	
1 Graduate Library	Supports graduate level programs	Library	TRAIN_1.TRAINING_1_INST.GRAD	...
2 Law Library	Supports Law School programs	Library	TRAIN_1.TRAINING_1_INST.LAW	...
3 Main Library	Supports undergraduate level programs	Library	TRAIN_1.TRAINING_1_INST.MAIN	...
4 Music Library	Supports specialized music programs	Library	TRAIN_1.TRAINING_1_INST.MUS	...
5 Resource Sharing Library	Temporarily manages inventory that is sent to or received from resource sharing partners	Library	TRAIN_1.TRAINING_1_INST.RES_SHARE	...
6 Science Library	Supports both graduate and undergraduate level programs in the sciences	Library	TRAIN_1.TRAINING_1_INST.BIO	...

Summary | Libraries | Contact Information | Calendar Management

1 - 6 of 6   ⊕ Add a Library

Each library is uniquely identified in Alma so that the specific needs of that library may be addressed

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Relationships Among Libraries
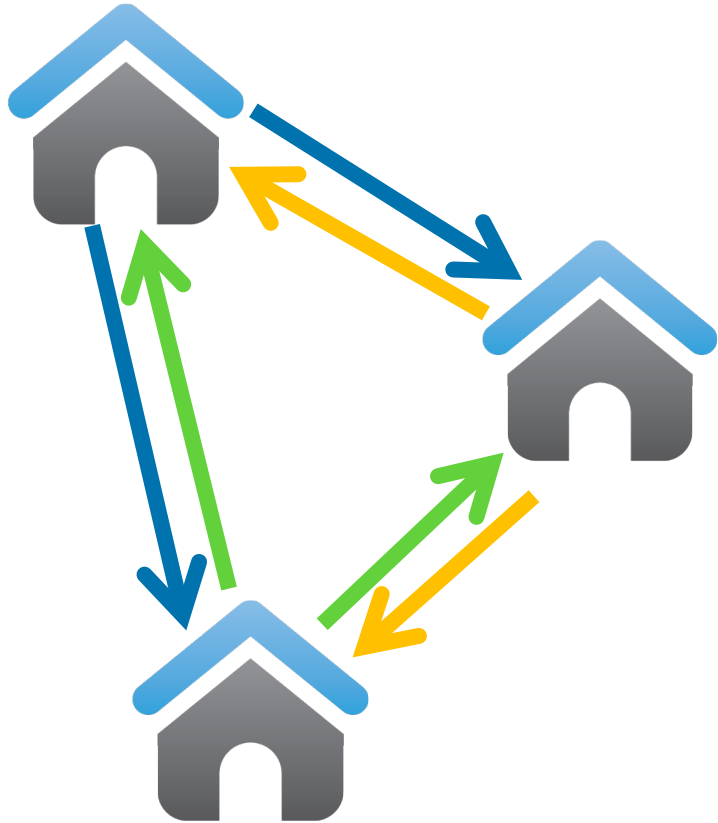
Relationships comprise:

Deliver to – the library that you are configuring is able to deliver requested items to a requesting library

Circulate for – the library that you are configuring is able to check in and check out items for the designated library

Acquire for – the library that you are configuring is able to acquire items for the designated library
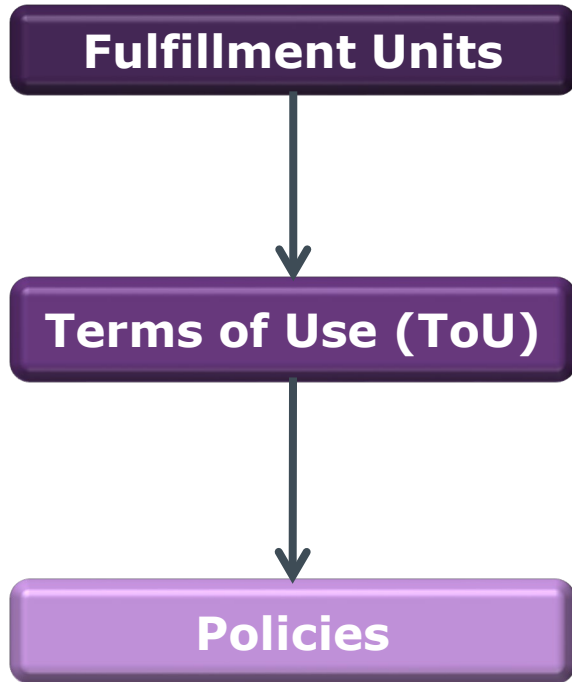
Locations

- Locations are physical places where items are stored

- For this reason, locations are associated with libraries, <u>not</u> with institutions

Fulfillment Units, Terms of Use and Policies

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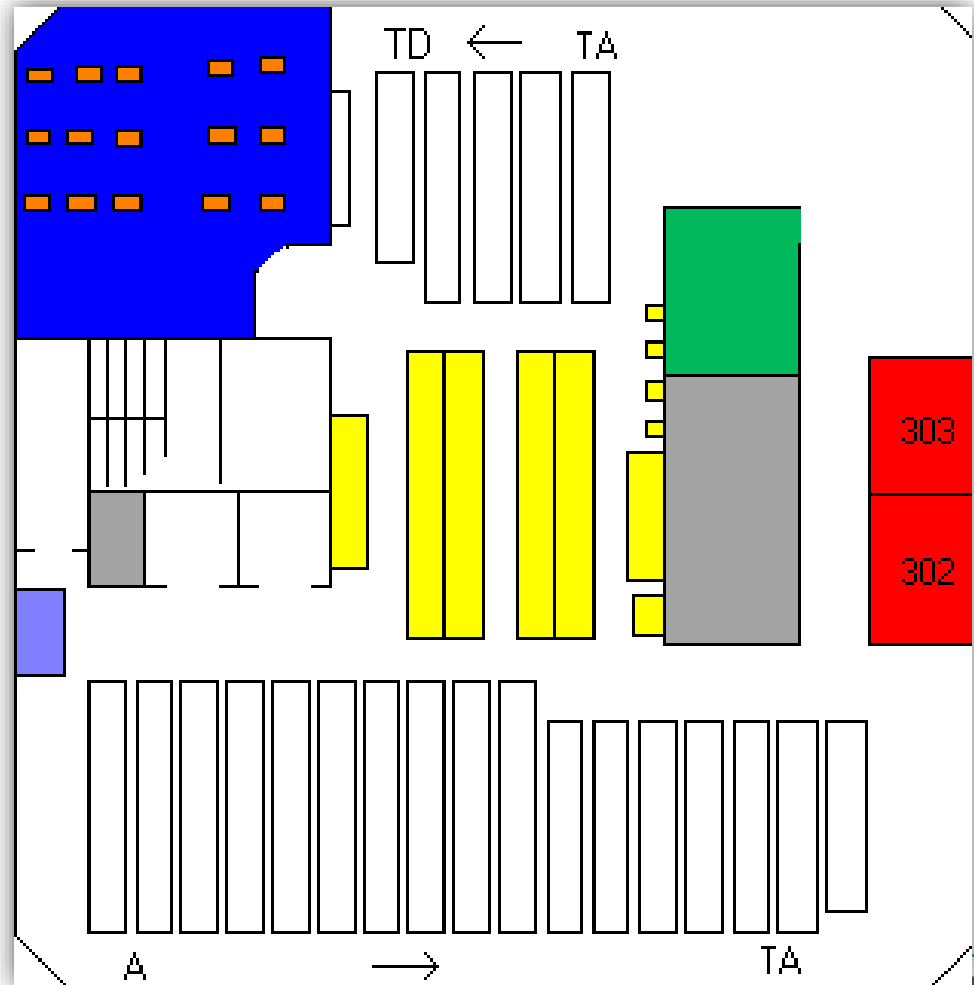
Fulfillment Units, Terms of Use, Policies

Fulfillment Units

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Terms of Use (ToU)

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Policies

- A grouping of locations that use similar Terms of Use

- A grouping of similar policies (loan-related policies, request-related policies, booking policies, etc.)

- Policies are the smallest elements; they comprise all options for how fulfillment ultimately works in your institution

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Fulfillment Units
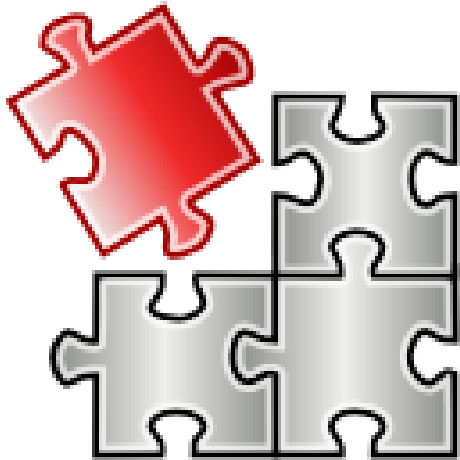
- Comprise sets of rules that apply to one or a group of locations using identical policies
- Includes separate definitions for
  - Loans
  - Requests for
    - Physical items
    - Digitization
- Utilize one or more Terms of Use (ToU)

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Terms of Use and Policies

- Are used as part of fulfillment units in connection with
  - Loans
  - Requests
    - Physical Items
    - Digitization
    - Booking
  - Resource sharing
    - Lending
    - Borrowing
- Includes fulfillment policies

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Policies

- Policies define attributes and parameters that are applied when a patron receives service

- When an institution wants to update an out-of-the-box policy, configuration changes are made to create this customization

- Used later as an integral part of TOU

Item Policies

- Are used to create exceptions within fulfillment unit rules

- Mean that some items may be configured to circulate differently than most items stored in this location

- Provide an opportunity to "override" Alma's location-based fulfillment rules

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Patron Settings

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Loan Limits

- Libraries may opt to restrict the number of concurrent loans any user may have

- Loan limit rules may be applied in different ways…
  - By Library
  - By Location
  - By Material type
  - By User group
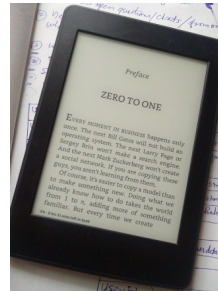
Patron Limits

- Applies to any patrons who use library services

- Upon reaching a defined limit, patron is blocked from further borrowing until resolved

- Based on user group to which patrons are assigned

- Relates to maximum cash value of overdue fines maximum number of overdue items permitted at one time

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Block Preferences
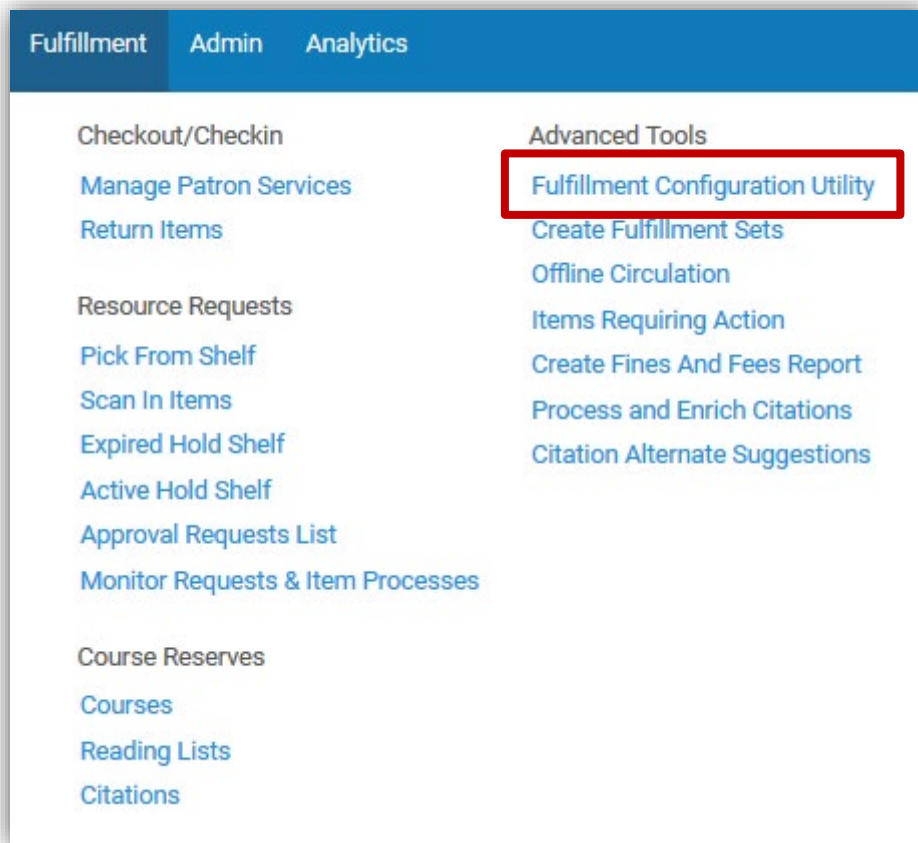
- Determine how blocks are handled at all Circulation Desks

- Are configured at the institution level, and,

- Apply to all libraries within the institution

Fulfillment Configuration Utility

Fulfillment Configuration Utility

Fulfillment Configuration Utility

Fulfillment Configuration Utility

Terms of Use Policies

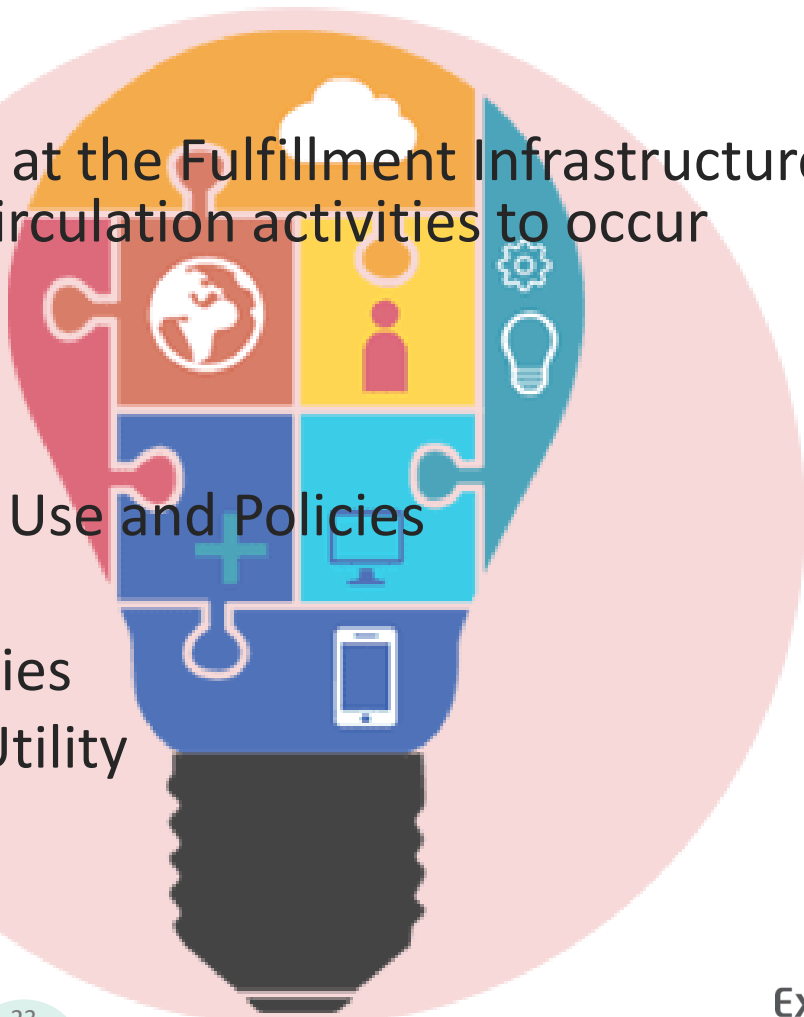|	Policy Type	Policy Name	Policy Description
1	Is Loanable	Loanable	Loanable
2	Is Renewable	Renewable	Is item renewable
3	Is Recallable	Recall Allowed	Recall is possible
4	Due Date	6 Month Loan	6 Month Loan
5	Grace Period	1 Days Grace Period	1 Days Grace Period
6	Recall Period	2 Week Recall Period	2 Week Recall Period
7	Requested Item Due Date	2 Week Requested Item Due Date	2 Week Requested Item Due Date
8	Overdue Fine	2.50 Open Days Overdue Fine	2.50 Open Days Overdue Fine
9	Recalled Overdue Fine	3.50 All Days Recalled Overdue Fine	3.50 All Days Recalled Overdue Fine
10	Maximum Renewal Period	365 Days Maximum Renewal Period	365 Days Maximum Renewal Period
11	Maximum Fine	25.00 Maximum Fine	25.00 Maximum Fine
12	Renew Fee	No Renew Fee	No Renew Fee
13	Lost Item Replacement Fee Refund Ratio	100 Percent Lost Item Refund	Default lost item replacement refund

Wrap-Up

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Conclusion

- During this session, we looked at the Fulfillment Infrastructure that needs to be in place for Circulation activities to occur smoothly

  - Libraries and Locations
  - Fulfillment Units, Terms of Use and Policies
  - Loan and Patron Limits
  - Relationships among libraries
  - Fulfillment Configuration Utility

Questions?

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