Fulfillment
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Introduction to Fulfillment

Fulfillment is the process by which patrons borrow and return physical resources, or access electronic or digital resources, from the institution. For information about requests, see Requests in Alma. For information about loaning and returning items, see Loaning Items and Returning Items.

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.

- **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.

- **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.

- **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.

- **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.

- **Advanced Tools** – This section describes managing fulfillment sets, changing loan dates in bulk import, viewing restore request jobs, uploading offline loan and return transactions, configuring criteria for items requiring action, and shifting requests between circulation desks. For a detailed explanation, see Advanced Tools.

- **Configuring Fulfillment** – This section describes fulfillment configuration activities. For a detailed explanation, see Configuring Fulfillment.
Requests in Alma

A resource request (or just "request") is for the acquisition, manipulation, movement, or processing of inventory. Requests are entered into Alma before they are fulfilled: an active request is one that was entered into Alma and is some stage of processing; a rejected, completed, or expired request is no longer in process.

Both active and inactive rejected requests appear in reports, although inactive requests cannot be retrieved in the Alma UI. For more information, see Filtering Results Using the Active Request Flag.

Requests can be entered by patrons using a fulfillment system, such as Primo. Requests can also be entered manually into Alma by librarians or generated internally by Alma. Many requests create a workflow process and/or a task in the Tasks list (see Tasks in the Tasks List).

Request Types

Alma handles many types of requests. Some request types described below may not be available at your institution, and additional ones (work orders) may be defined by your administrator. The following table describes all the types of requests that you may encounter in the course of handling fulfillment.

<table>
<thead>
<tr>
<th>Request Type</th>
<th>Description</th>
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<tbody>
<tr>
<td>Acquisition Technical</td>
<td>A work order request to perform some kind of technical service, for example</td>
</tr>
<tr>
<td>Services</td>
<td>copy cataloging.</td>
</tr>
<tr>
<td>Active</td>
<td>A request that is in process.</td>
</tr>
<tr>
<td>Binding</td>
<td>A work order request to fix a physical item.</td>
</tr>
<tr>
<td>Booking</td>
<td>A patron request to reserve a resource (such as a room or a book that</td>
</tr>
<tr>
<td></td>
<td>cannot be checked out) for a specific time period.</td>
</tr>
<tr>
<td>Borrowing</td>
<td>A resource sharing request placed by a local patron and fulfilled by another</td>
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<tr>
<td></td>
<td>institution. Implemented as an ILL outgoing request.</td>
</tr>
<tr>
<td>Completed</td>
<td>A request that was fulfilled successfully.</td>
</tr>
<tr>
<td>Department</td>
<td>Any request managed by a particular department.</td>
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<tr>
<td>Digitization</td>
<td>A work order request for digital copies of a physical or electronic resource.</td>
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<tr>
<td></td>
<td>This is typically used to make a copy of a book chapter or an article for</td>
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<tr>
<td></td>
<td>a patron or a group of students, and may require copyright clearance. The</td>
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<tr>
<td></td>
<td>types of digitization requests are:</td>
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<tr>
<td></td>
<td>• Electronic - A digitization request for an electronic resource.</td>
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<tr>
<td></td>
<td>• Physical - A digitization request for a physical resource.</td>
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<tr>
<td></td>
<td>• Library Physical - A digitization request for a reading list citation</td>
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<tr>
<td></td>
<td>associated with a physical item. The request is initiated by library staff.</td>
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<tr>
<td></td>
<td>The librarian is asked to fill out copyright clearance information.</td>
</tr>
<tr>
<td>Request Type</td>
<td>Description</td>
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</tr>
<tr>
<td>Patron</td>
<td>A digitization request made on behalf of a patron. The patron may have been asked to sign a copyright declaration.</td>
</tr>
<tr>
<td>Staff</td>
<td>A digitization request (unrelated to a reading list citation) that is initiated by library staff. The librarian is asked to fill out copyright clearance information.</td>
</tr>
<tr>
<td>Expired</td>
<td>A request that was not fulfilled and is now past its date (is no longer relevant).</td>
</tr>
<tr>
<td>External</td>
<td>A request to locate a resource originating external to Alma, such as a request from Primo. This is not a resource request (but is included here for completeness). For information, see Discovery Interface Display Logic.</td>
</tr>
<tr>
<td>Fulfillment</td>
<td>A request within an institution, as opposed to a resource sharing request.</td>
</tr>
<tr>
<td>General Hold</td>
<td>A patron request to reserve a resource for pickup at a certain location (for bibliographic records with holdings but no items).</td>
</tr>
<tr>
<td>Internal</td>
<td>See library.</td>
</tr>
<tr>
<td>Lending</td>
<td>A resource sharing request placed by another institution's patron and fulfilled by the local institution. Implemented as an ILL incoming request.</td>
</tr>
<tr>
<td>Library</td>
<td>Any internal request, typically generated by another request. For example, a borrowing request might generate a move request, which is a type of library request.</td>
</tr>
<tr>
<td>Move</td>
<td>A library or internal request to temporarily or permanently move an item from one library/shelf to another.</td>
</tr>
<tr>
<td>OpenURL</td>
<td>An external request for information about a resource made by Alma's OpenURL link resolver. Not a resource request.</td>
</tr>
<tr>
<td>Patron</td>
<td>Any request made on behalf of a patron. The request can be made by the patron on Primo or by the librarian in Alma.</td>
</tr>
<tr>
<td>Pending</td>
<td>A request that is on the request queue but not yet active (its status is Ready).</td>
</tr>
<tr>
<td>Physical Item</td>
<td>A patron request to check out a physical item.</td>
</tr>
<tr>
<td>Purchase</td>
<td>A request to acquire a physical title or a license to an electronic title. See Purchase Requests.</td>
</tr>
<tr>
<td>Recall</td>
<td>A workflow step requesting that an item be returned to the institution. For more information, see Recall Requests.</td>
</tr>
<tr>
<td>Rejected</td>
<td>A request that was denied.</td>
</tr>
<tr>
<td>Resource</td>
<td>A generic term for any fulfillment or resource sharing request. This may be for a item that can be checked out, like a book, a technical services request to bind an item, or a request to reserve a room or a piece of equipment.</td>
</tr>
<tr>
<td>Resource Sharing</td>
<td>A request by a patron in one institution fulfilled by another institution, as opposed to a fulfillment request.</td>
</tr>
<tr>
<td>Restore</td>
<td>A move request to return an item in a temporary location to its permanent location.</td>
</tr>
<tr>
<td>Ship</td>
<td>A request to ship an item, either physically or digitally (by email).</td>
</tr>
<tr>
<td>Transit for Reshelving</td>
<td>A restore request for an item that was returned after a lend request.</td>
</tr>
</tbody>
</table>
## Request Type Description

<table>
<thead>
<tr>
<th>Request Type</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Work Order</td>
<td>A request to perform an action on a physical item, such as digitize or bind (fix) the item. A work order sends an item to the work order department that can handle it, which then returns it to its location when it is done. Work orders are defined on the Work Order Types page. A work order can go through several stages; in each stage, the work order has a status, called a process type. For example, a binding request can have the process types Sent to Bindery, Binding Prep, In Process, and so forth. Process types are defined on the Work Order Type Statuses page; see Configuring Work Order Type Statuses. Also see Configuring Request Task Names.</td>
</tr>
</tbody>
</table>

## Booking Requests

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 important resources in a library's catalog and can be at the library only during a specific time, the researcher can create a booking request to reserve those resources for that time. This provides exclusive rights to the materials reserved while the researcher is physically at the library, thereby making maximum use of his or her 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 using booking requests, usable for a set time period before the item must be returned. For more information, see Booking.

For more information about Booking, see Booking Requests in the Alma Essentials Training Kit.

## Pages for Managing Requests

You can search for many types of requests using the persistent search box that appears at the top of every page; see Searching in Alma.

Alma includes several pages that display or enable you to work on requests, depending on your user role and your department. To change your department, see Library/Desk Selector in The Persistent Menu. Many of the pages below can also be reached by selecting a task in the Task List; see Tasks in the Tasks List.

### Alma Pages for Managing Requests

<table>
<thead>
<tr>
<th>Page</th>
<th>Path</th>
<th>Request Types</th>
<th>Roles</th>
<th>Description</th>
<th>More Information</th>
</tr>
</thead>
</table>
| Active Hold Shelf Items     | Fulfillment > Resource Requests > Active Hold Shelf Items | Physical Item | Requests Operator      | After an item that was requested by a patron is picked up from the stacks, it is sent to the hold shelf at the circulation desk. From the moment the item arrives at the hold shelf until the request has expired or it is removed, it is considered to be on the active hold shelf of the circulation desk. On this page, you can:  
  - Change the order of multiple requests for the same item using a queue  
  - Cancel the request                                                                                                           | Managing Active Hold Shelf Items                       |
<table>
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<tr>
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</table>
| Approval Requests List | Fulfillment > Resource Requests > Approve Digitization Requests | Digitization | Fulfillment Services Operator, Fulfillment Services Manager | - Extend the request to a later time or date  
- Mark the item as missing | Approving/ Rejecting a Request for Digitization |
| Create Request | Several ways. For example: search the repository and select Request beneath a physical item or title in the results. | Booking, Digitization, Hold, Move, Physical Item | Fulfillment Services Operator, Fulfillment Services Manager | You can create a request on an item, typically on behalf of a patron or a staff member.  
On this page, you can:  
- Create a request | Creating a Request from the Institution, Creating Booking Requests |
| Expired Hold Shelf Items | Fulfillment > Resource Requests > Expired Hold Shelf Items | Physical Item, Requests | Operator | After an item that was requested by a patron is picked up from the stacks, it is sent to the hold shelf at the circulation desk. When an item’s expiration date is reached, the item is listed as expired. If it is not collected by a specified time, it should be removed from the hold shelf and returned to its permanent location.  
On this page, you can:  
- Extend the request to a later time or date  
- Mark the item for reshelving  
- Mark the item to send to the circulation desk  
- Mark the item to send to another library  
- Activate the next request waiting for this item in the queue | Managing Expired Hold Shelf Items |
<p>| In Process Items | Fulfillment &gt; Resource Requests &gt; Manage In Process Items or | Acquisition Technical Services, Binding | Receiving Operator, Purchasing Operator | After you receive physical material, it may be necessary to perform work on the material before it can be made available to the library. In addition, a work order request may require you to perform work on material before other requests can be made on it. You process new material or work orders on this page. | Post-Receiving Processing |</p>
<table>
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<tr>
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</table>
|      |      | Digitization  | Work Order Operator (digitization) | This page appears differently in a digitization department and in any other department (such as an acquisitions technical services department). In a digitization department, on this page, you can:  
  • Cancel the request  
  • Indicate that the request will be fulfilled using an electronic item rather than a physical item, or vice versa  
  • Attach the digitized item to the request  
  • Deliver the item to the requester(s) by email  
  • Save the digitized item | |
|      |      | Physical Item | | In any other department, on this page, you can:  
  • Indicate that processing has moved to a new stage or is complete  
  • Edit a physical item’s information  
  • Extend the request to a later time or date  
  • Print a slip containing information about the item  
  • Write the item’s information to RFID  
  • Un-receive the item (in a receiving department) | |
| Pick Up Requested Resources | Fulfillment > Resource Requests > Pick From Shelf | Physical Item | Requests Operator | Physical items are picked up from a shelf in the stacks (the general shelves of the library). If requested by a patron, the item is transferred to the hold shelf. On this page, you can:  
  • Print a call slip for the item before going to look for the item  
  • Cancel the request or have it picked up by another location  
  • Extend the request to a later time or date  
  • Mark the item as missing  
  • Convert the request to a resource sharing borrowing request | Pickup at Shelf |
| Resource Request Monitoring | Fulfillment > Resource Requests > Monitor Requests & Item Processes | Binding Booking Digitization General Hold Move | Fulfillment Services Operator Fulfillment Services Manager Requests Operator | Most workflow requests appear on this general information page. On this page, you can:  
  • View the history of the request  
  • Cancel the request  
  • Extend the request to a later time or date  
  • Mark the item as missing | Managing Requests and Work Orders |
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<td></td>
<td></td>
<td>Physical Item</td>
<td></td>
<td>- Print a call slip for the item before going to look for the item  &lt;br&gt; - Convert the request to a resource sharing borrowing request</td>
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<td>Ship</td>
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<td>Restore</td>
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<td>Transit for Resheling</td>
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<td>Fulfillment Services Operator</td>
<td>Patrons can locate resources at other institutions and ask that they be delivered to the local institution. This creates a borrowing request at the local institution and a lending request at the partner institution.  &lt;br&gt; For physical items, the item is received by the local institution, picked up and returned by the patron, and (typically) returned to the partner institution. Electronic items can be delivered digitally or physically from the partner institution.  &lt;br&gt; On this page, you can:  &lt;br&gt; - Add a new borrow request  &lt;br&gt; - View, edit, copy, cancel, or reject a request  &lt;br&gt; - Ask the patron for more information  &lt;br&gt; - Edit the physical item's information  &lt;br&gt; - Recalculate the rota (see Resource Sharing Partners and ROTAs)  &lt;br&gt; - Send the request to the partner institution  &lt;br&gt; - Mark a request as recalled by the partner institution, received, returned by the patron, or completed (remove the request)  &lt;br&gt; - Renew a request or request a renewal of a request</td>
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<td>Fulfillment Services Manager</td>
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<td></td>
<td>Resource Sharing Borrowing Requests</td>
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<td></td>
<td>Fulfillment Services Operator</td>
<td>Patrons at other institutions can locate resources at your institution and ask that they be delivered to the other (partner) institution. This creates a borrowing request at the partner institution and a lending request at your institution.  &lt;br&gt; For physical items, the item is picked up at the stacks and sent to the partner institution and then received back from the partner institution and (typically) returned to the stacks. Electronic items can be send digitally or physically.  &lt;br&gt; On this page, you can:  &lt;br&gt; - Add a new lend request  &lt;br&gt; - View, edit, copy, cancel, or reject a request</td>
<td>Resource Sharing Lending Requests</td>
</tr>
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<td>Fulfillment Services Manager</td>
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<tr>
<th>Page</th>
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<th>Roles</th>
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<th>More Information</th>
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</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Locate the item and print a slip for it&lt;br&gt;• Fulfill the request, physically or digitally&lt;br&gt;• Extend the due date for the request&lt;br&gt;• Communicate with the borrowing institution</td>
<td></td>
</tr>
</tbody>
</table>

**The Request Queue**

When multiple requests are placed on the same item, the requests are queued. The list of requests can be viewed on the Request Queue page *(Fulfillment > Resource Requests > Monitor Requests & Item Processes)*; select the **Place in Queue** value in one of the items).

The summary box presents the title, current location, call number, and maximum requests that can be active for the item (which is generally equal to the number of copies of the book).

The following information appears for each request:

- **Request Type**
- **Destination** - The location where the item is expected as a result of this request
- **Current Activity** - The current workflow step
- **Priority** - The request priority. See [Request Priority](#).
- **Barcode**
- **Material Type**
- **Request Date** - For completed requests, the request date will show the date that the request was completed or canceled.
- **Interested Until** - An expiration date for this request
- **Requester**
- **Description**
- **Requester Group** - The user group of the requester
- **Activate** - Move this request to the top of the queue. This option appears only if an item is available. See [Request Priority](#).

---

**Note**

For title requests, only requests for the preferred title appear in the request queue.

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**Request Priority**

The request priority for each item in the queue determines which request in the queue is active. Library requests, such as move requests and work order requests, take priority over patron requests. Patron requests are fulfilled by the order in which they were created. The Request Priority fulfillment policy can change priorities for a group. For information on this...
Resource Sharing Partners and Rotas

A partner is an institution, other than yours, that is willing to fulfill a resource sharing request or that may ask you to fulfill a resource sharing request. A rota is a list of partners that are queried to see if they can fulfill a particular resource sharing borrowing request. A rota can be ordered, where the partners are queried in a specific order, or random. You can have multiple rotas, each defined by a rota template.

When you create a borrowing request, you can manually assign one or more partners to the request, either directly and/or using one or more rotas. A rota is also assigned automatically if it matches a rota assignment rule.

To configure partners, see Resource Sharing Partners. To configure rota templates, see Configuring Rota Templates. To configure rota assignment rules, see Configuring Rota Assignment Rules.

Resource Sharing Requests with Multiple Items

Resource sharing requests may be fulfilled by one or more items. When multiple items have been shipped for a request, multiple line items will be displayed in the following places:

- Patron Services - requests tab
- Resource Request Monitoring
- Active/Expired Hold Shelves
- Receiving/Shipping Items

Additionally, the Resource Sharing Task List indicates the existence of multiple items with a Multiple Barcodes link (see also Receiving or Shipping Multiple Items for a Single Request).

In contrast, the Primo My Account request list shows only one line item per request. This is because Primo displays only the resource sharing request, regardless of how many items shipped to fulfill the request, while Alma displays all the items to the operator that are on shelf or in transit.

Request Jobs

Alma provides several jobs that can be used to manage requests in bulk. Manual jobs can be used to create or delete requests on physical items or titles. See the relevant page or entry to see details and configuration information about scheduled jobs.

Manual

- [Cancel Physical Items Requests](#) - Cancels open requests for physical items.
- [Create Physical Item Move Requests](#) - Initiates moving physical items to a new location.
- [Create Physical Item Work Orders](#) - Creates a work order request for physical items.
Scheduled

- **Delete Acquisition Requests** - This is an internal job that removes dummy internal acquisition requests.
- **Requests - Handle Expiration Step** - Marks requested items as missing when requests in the pickup from shelf stage have passed their expiration date.
- **Requests - Restore Temporary Shelved Items** - Creates restore item requests on all temporarily shelved items whose due back date is the current day or earlier.
- **Requests - Recalculate after Inventory Update** - Recalculates requests after changes to the inventory are made.
- **Requests - Send Report** - Generates one letter per patron detailing all requests by status.
- **Expired Resource Sharing Request** - Checks for expired resource sharing requests.
- **Items Requiring Special Action** - Identifies items which may require some action, including items that have requests on them.
- **Transfer Requests** - Move all requests from a circulation desk to a different circulation desk in the same library.
Circulation Desk Operations

This section includes:

- Circulation Desk Operations Workflow
- Creating a Request from the Institution
- Fulfillment Networks
- Managing Patron Services
- Automated Fulfillment Network Requests (AFN)
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. See Requests in Alma.

A request can be one of the following:

- A booking request
- A request to move permanently or temporarily
- A request for a physical item
- A request to convert a physical or electronic item into a digital copy (digitalization)
- A general hold request
- A return request, to return an item to its permanent location

**Note**

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

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 in Alma).

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

3. Internal staff perform operations according to the type of request (see Resource Requests or Managing Requests and Work Orders). 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).

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

1. **Loans** - The Circulation Desk Operator/Manager loans the requested item to the patron from the hold shelf (see Loaning Items).

   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 Loaning Items).

   __Note__

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

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

3. **View Requests** - The Circulation Desk Operator/Manager views a list of requested items (see Requested Items), including the request status.
Creating a Request from the Institution

For more information on requests, see Requests in Alma.

A Circulation Desk Operator/Manager creates a request by searching for titles or items in the institution (see Searching in Alma), 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.

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

You can move requests from one circulation desk to another using the Transfer Requests option (see Transfer Requests).

Creating a Request

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

- Fulfillment Services Operator

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

Note

- The type of request that you can create, and its limitations, depend on whether the title/item is physical or electronic, whether the titles have holdings and if these are monograph or serial, and the policies of the item (see Configuring Item Policies), the fulfillment unit that will service the request (see Configuring Policies), and the institution (see Configuring Terms of Use).
- A patron may be blocked from borrowing items, or an item may be blocked from being borrowed (see Blocking and Unblocking Users and Configuring Block preferences).
- By default, an expired patron can create a patron request. This can by changed by setting the check_for_expired_account parameter to true. For more information, see Configuring Other Settings (User Management).
- You can request an item belonging to a bibliographic record for which an item is already on loan to the requesting patron. 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). If the items do not have different policies, you will not be able to place the request for the second item belonging to the same bibliographic record.

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.

To create a request:
1. Search for an item (see Searching in Alma). For physical items, select Request from the row actions list. For electronic titles/items, select Document Delivery from the row actions list. The Create Request page appears.

2. From the Request type drop-down list, select the type of request.
   - **Booking request** - Reserve resources for a patron during a specified time frame. For details on creating a booking request, see Creating Booking Requests.
   - **Move permanently / Move temporarily** - Permanently or temporarily change the location of a physical title or item. The To drop-down list appears, enabling you to select a library.

   ![Create Request](image)

   **Move Permanently Request**

   For additional fields in this area, see step 3.

   When moving a title, all items associated with the title are moved.

   - **Patron digitization request / Patron Electronic Digitization Request** - Create a digital copy (in full or in part) of a physical/electronic title or item on behalf of a patron. The Requester and Managing Department drop-down lists appear, enabling you to select the patron and the digitization department.

     If there is only one available department to manage the request, Managing Department will be automatically populated with that department.

     Select Calculate Digitization Fee to show the digitization fee that will apply to this request, if any has been configured. This will not apply the fee to the request. The fee is applied when the request is completed or approved.

     If there are items with different fee policies that may be used to fulfill the request, the fee calculation may change when the digitization is done.

     For more information about configuring and using digitization request fees, see the Digitization Request Fees video (4:02 mins).

     Select Copyright Declaration Signed by Patron to indicate that the patron selected his or her agreement with the copyright when submitting the request.

     For an article, additional fields are described in step 3.

     The digitization request generates a temporary move request to move the item to the digitization department. After digitizing, another request is generated to return the item to its permanent location.

     If you select Partial Digitization (see step 4), the fields Volume (electronic only), Issue (electronic only), Chapter/Article Title, Chapter/Article Author, two sets of fields for Required Pages (from and to), and Full
Chapter appear below this.

For additional fields in this area, see step 3.

- **Patron physical item request** - Create a request to loan a physical title or item to a patron. The **Requester** and **Pickup At** drop-down lists appear, enabling you to select the patron and the destination for pickup.

![Physical Item Request](image)

**Note**

The **Pickup At** field includes the locations specified in the Borrowing Terms of Use by the Pick Up Location policy. The options in the drop-down list are displayed in alphabetical order, according to the location name.

Select **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:

You can enable a physical item request to be delivered to a user’s home or office. For details, see [Creating Personal Delivery Requests](#).

For additional fields in this area, see step 3, below.

- 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 facility 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](#)).

- An item whose location is the same as the request’s pickup location receives the highest priority to fulfill the
Staff Digitization Request / Staff Electronic Digitization Request / Library physical digitization request -

Create a digital copy (in full or in part) of a physical title or item on behalf of a staff member. The staff member’s request may be the result of a request by an instructor. **Library physical digitization request** is used for items associated with reading list citations; there can only be one open request of this type for any citation.

The **Managing Department** drop-down list appears, enabling you to select a digitization department that receives the digitization request. If there is only one available department to manage the request, **Managing Department** will be automatically populated with that department.

The digitization request generates a temporary move request to move the item to the digitization department. After digitizing, another request is generated to return the item to its permanent location.

If you select **Partial Digitization**, the fields **Volume** (electronic only), **Issue** (electronic only), **Chapter/Article Title**, **Chapter/Article Author**, two sets of fields for **Required Pages** (from and to), and **Full Chapter** appear below the **Note** field.

In addition, several fields appear in the **Copyright Attributes** section. These fields are used to record intended usage information. If copyright approval is required by the digitization rules, an approval task appears on the Approval Requests List page; see **Digitization Processing**. Fill in the fields:

- **Number of Students** – The number of students that will be using the digitized material.
- **Number of Copies for Students** – The number of copies per student.
- **Number of Copies for Staff** – The number of copies per staff member.
- **Resource Total Pages** – Total pages in the requested item.
- **Required Chapters** – Chapter numbers needed for the request. This is free text for the digitization department to note which chapters need to be scanned.
- **Total Chapters Count** – Total number of chapters that are required. This is a numerical field.
- **Required Pages** (if **Partial Digitization** was not selected) – Two sets of fields for **From** and **To** pages that will be digitized.
- **Includes Images(s)** – Whether the pages to digitize include images.
- **Total Required Pages** – This field is prefilled automatically.
- **Source for Copyright** – For regions with a copyright authority (see **copyright_region** parameter in **Configuring Other Settings**), select a value if one is relevant.
- **Date Available From / Date Available To** – The date range in which any copies will be made available.
- **Note 1/2/3** – Private notes, if any.
  - **General Hold Request** - Appears only when placing a request for a holding that contains no items. For details on creating a general hold request, see [Creating a General Hold Request](#).
  - **General Digitization Request** - Appears only when placing a request for a holding that contains no items. For details on creating a general digitization request, see [Creating a General Digitization Request](#).

3. The following additional fields may appear:
   - Enter any notes in the **Notes** field. Note that this field is limited to 1000 characters.
   - The remaining fields in this step appear only for physical serial items, or for physical titles that contain at least one serial item.
   - Select one of the options – Use the description that appears in the **Description** field, below.
     - **Manual** – Enter a manual description in the **Manual Description** field, below.
       - These buttons appear when there are no items associated with the title. In this case, **Manual** is assumed.
       - If you select **Description**, the following fields appear:
         - **Year** – Year for the request.
         - **Volume** – Volume for the request.
       - **Description** – The descriptions of the items. The option **All** appears if you did not select both **Year** and **Volume** and there are items without descriptions. Select **All** to indicate all items (including those without descriptions).
         - If you select **Manual**, or if the title has associated holdings but no items, the following fields appear:
           - **Holding** – Select a holding for the item. See [Creating a Non-Cataloged Serial Item Request](#).
           - **Manual Description** – Enter a description. See [Creating a Non-Cataloged Serial Item Request](#).
             - For holdings in remote storage, if the **Allow Manual Description Requests** option has been disabled on the configuration for the remote storage facility, selecting **Manual** will cause the holdings in remote storage to be suppressed from the available items for this request. See [Configuring Remote Storage Facilities](#).

4. Add request attributes in the **Add Request Attributes** area. After selecting each attribute and its corresponding value, select **Add Request Attribute**. The attribute appears in the **Additional Request Attributes** area. The available attributes depend on the selected **Request Type**:

```markdown
<table>
<thead>
<tr>
<th>Request Type</th>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Booking Request</td>
<td></td>
<td>See <a href="#">Creating Booking Requests</a>.</td>
</tr>
<tr>
<td>Move Permanently or Move Temporarily</td>
<td>Number of Copies</td>
<td>The number of copies requested</td>
</tr>
<tr>
<td>Move Permanently or Move Temporarily</td>
<td>Destination Locations</td>
<td>Where to deliver the copies</td>
</tr>
<tr>
<td>Move Permanently or Move Temporarily</td>
<td>Due Back For Move Temporarily only</td>
<td>When the items are due back</td>
</tr>
</tbody>
</table>
```
<table>
<thead>
<tr>
<th>Request Type</th>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Call Number Type</td>
<td>See <code>call_number_type</code> in Configuring Other Settings.</td>
</tr>
<tr>
<td></td>
<td>Call Number</td>
<td>The call number</td>
</tr>
<tr>
<td></td>
<td>Item Policy</td>
<td>The item’s override policy for loan rules. For more information, see Configuring Item Policies.</td>
</tr>
<tr>
<td>Patron Digitization Request / Patron Electronic Digitization Request / Staff Digitization Request / Staff Electronic Digitization Request / Library physical digitization request</td>
<td>Partial Digitization</td>
<td>Select to indicate that the request is for only part of the item, not the entire item. The fields Volume (electronic only), Issue (electronic only), Chapter/Article Title, Chapter/Article Author, two sets of fields for Required Pages (from and to), and Full Chapter are added to the Create Request area.</td>
</tr>
<tr>
<td>Patron Digitization Request / Patron Electronic Digitization Request / Staff Digitization Request / Staff Electronic Digitization Request / Library physical digitization request</td>
<td>Material Type (non-electronic only)</td>
<td>Select the desired material type from the available types.</td>
</tr>
<tr>
<td>Patron Physical Item Request</td>
<td>Date Needed By</td>
<td>Select the date that the request is needed from the calendar tool.</td>
</tr>
<tr>
<td>Patron Physical Item Request</td>
<td>Material Type</td>
<td>Select the desired material type from the available types.</td>
</tr>
<tr>
<td>Patron Physical Item Request</td>
<td>Date Needed By</td>
<td>Select the date that the request is needed from the calendar tool.</td>
</tr>
<tr>
<td>Patron Physical Item Request</td>
<td>Loan Period</td>
<td>The amount of time the user has before having to return the item.</td>
</tr>
<tr>
<td>General Hold Request</td>
<td></td>
<td>See Creating a General Hold Request.</td>
</tr>
<tr>
<td>General Digitization Request</td>
<td></td>
<td>See Creating a General Digitization Request.</td>
</tr>
</tbody>
</table>

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

5. Select Submit. The request is created with a unique identification number and processed (see Resource Requests). A completed request appears 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

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

- Fulfillment 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 from the General Configuration menu (see Configuring Work Order Types).

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. From a physical item search (see Searching in Alma), select Work Order from the row actions list. The Work Order option appears only when searching for physical items. The Place Item in Process page opens.

2. In the Process Type drop-down list, select a work order.

   The displayed work orders are created on the Work Order Types page, accessible from the General Configuration menu (see Configuring Work Order Types).

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 appear 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 Managing Department field. The options in this field are the departments associated with the selected work order type.

6. Select 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 Work Order from the row actions list to open the Create Request page. Follow step 2 through step 6 in the procedure above.

- Scan an item at a work order department (you must be at a work order department; see Library/Desk Selector in The Persistent Menu). 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.

- Select Work Order from the row actions list for an item on the List of Items page, which appears when selecting Items for a physical titles search result. For details on the List of Items page, see Working with the List of Items.

Ex Libris, a ProQuest Company
Creating a General Hold Request

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

- Fulfillment 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 (Configuration Menu > Fulfillment > Discovery Interface Display Logic > Display Logic Rules). For more information, see Configuring Display Logic Rules.

- Customize the label for the c.uresolver.getit2.request.nolitems parameter on the Discovery Interface Labels Code Table page (Configuration Menu > Fulfillment > Discovery Interface Display Logic > Labels). For more information, see Configuring Labels.

To create a general hold request:

1. Search for a title and locate a result that has a holding but no items.

2. Select Request. The Create Request page appears.

3. In the Request/Process Type field, select General hold request. The page refreshes.

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

   For additional fields in this area, see step 3 in Creating a Request.

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 Additional Request Attributes section, select Date Needed By and a date by which the item is needed. The date appears in the Additional Request Attributes section.
7. Select **Submit**. A confirmation message appears at the top of the page, indicating that the request was successfully submitted.

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 appears with the following values:
   - **Workflow Step** = Pickup From Shelf
   - **Request Type** = General Hold Request

9. Create an item and scan it into Alma, as follows:
   1. Ensure your location is the library that is managing the hold request (specified in the **Managed by:** value on the Resource Request Monitoring page; see Library/Desk Selector in **The Persistent Menu**).
   2. On the Scan In Items page (**Fulfillment > Resource Requests > Scan In Items**), enter a barcode in the **Scan item barcode** field and select **Create Item**. The Choose Holding Type dialog box appears.
   3. Select **Existing** and select **Choose**. The Quick Cataloging page appears. Select the title to which the new item should be linked, and fill in the relevant item information.
4. 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.

5. Select Save. The items is created.

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.

An Acquisition Technical Services work order is created.

Creating a General Digitization Request

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

- Fulfillment Services Operator

A general digitization request is created when you request a holding that has no items. When the item is added/inserted into Alma, the request is set to Pickup from Shelf status. Once the exact copy is found and scanned, the request then follows the regular flow of a digitization request.

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

- Add rules for general digitization requests on the Discovery Interface Display Logic page (Configuration Menu > Fulfillment > Discovery Interface Display Logic > Display Logic Rules). For more information, see Configuring Display Logic Rules.

- Customize the label for the c.uresolver.getit2.request.noltems parameter on the Discovery Interface Labels Code Table page (Configuration Menu > Fulfillment > Discovery Interface Display Logic > Labels). For more information, see Configuring Labels.

To create a general digitization request:

1. Search for a title and locate a result that has a holding but no items.

2. Select Request. The Create Request page appears.
3. In the Request/Process Type field, select General digitization request. The page refreshes.

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

   For additional fields in this area, see step 3 in Creating a Request.

5. In the Part to Digitize field, enter the specific sections to be digitized.

6. If you select the Partial Digitization check box, the fields Volume (electronic only), Issue (electronic only), Chapter/Article Title, Chapter/Article Author, two sets of fields for Required Pages (from and to), and Full Chapter display.

7. In the Managing Department field.

8. In the Additional Request Attributes section, select Date Needed By and a date by which the item is needed. The date appears in the Additional Request Attributes section.

9. Select Submit. A confirmation message appears at the top of the page, indicating that the request was successfully submitted.

10. 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 appears with the following values:

    ◦ Workflow Step = Pickup From Shelf
    ◦ Request Type = General Digitization Request

11. Create an item and scan it into Alma, as follows:

    1. Ensure your location is the library that is managing the digitization request (specified in the Managed by: value
on the Resource Request Monitoring page; see Library/Desk Selector in The Persistent Menu.

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

3. Select Existing and select Choose. The Quick Cataloging page appears. Select the title to which the new item should be linked, and fill in the relevant item information.

![Quick Cataloging Page](image)

Quick Cataloging Page

4. In the Title field, search for the title for which you created the General Digitization Request.

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

5. Select Save. The items is created.

   The item is put in transit to the digitization department and the standard workflow for fulfilling a digitization request is activated.

---

**Automatically Converting a Hold Request to a Resource Sharing Request**

To configure policies and Terms of Use to allow automatic conversions, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

To better serve patrons, unfulfilled hold and patron digitization requests may be converted into resource sharing requests. If the request has **Automatically Convert to Resource Sharing** set to true, and the request is going to be canceled due to execution of either of the jobs, Requests - Handle Expiration Step or Requests - Recalculate After Inventory Update, the request is converted.

Before converting, the following validations are performed:

- Pickup location is a library (not a circulation desk).
- Resource sharing library needs to have a Deliver To relationship with the pickup location.
- There is a default location for the resource sharing library.
- The date needed is not in the past.

If any of these are not true, the request is not converted.

A cancellation letter with the reason **Converted to Resource Sharing Request** is sent to the patron when a hold request is converted to a resource sharing request. Existing requests are canceled with the cancellation reason **Converted to Resource Sharing Request**.

The status of new requests is **Created borrowing request**.
To set a policy for converting:

1. On the Terms of Use and Policies table (Configuration Menu > Fulfillment > Physical Fulfillment > Terms of Use and Policies), select Add a Terms of Use.
2. Select Request and select Next.

3. From the drop-down box next to Automatically convert to resource sharing, select Convert to resource sharing, and select Next.
4. Confirm the settings for this policy and select Save.

Note
The policy is activated only if either of the above mentioned jobs are active and determine that a hold request must be canceled due to the expiry of an existing matching physical inventory that can fulfill the request.

Creating a Request for a Non-Cataloged Serial Item

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

- General System Administrator
- Fulfillment Administrator

To scan a serial 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 yet cataloged in Alma, you can still create a request for the item; after adding the item to the repository, you can attach the item to the request.

When creating the request, you must manually add a description. When adding the item to the repository, you must use the same description.

**To create a request for a non-cataloged serial item:**

1. Search for a physical title or item of a serial item that is not in the inventory (see [Searching in Alma](#)).
2. Select **Request** from the row actions list. The Create Request page appears.
3. In the **Request/Process Type** field, select a request or process type other than **Booking**. The page refreshes.
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. The value you enter here must exactly match the description of the inventory item you add later.
8. Select **Submit**. A confirmation message appears on the search results page.
To create an item and attach it to a request:

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

![Quick Cataloging Page](image)

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.

---
**Note**

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

---
5. Optionally add a material type, item policy, and/or public note.
6. Select Save. The item appears on the Scan In Items page.

![Scan In Items Page](image)

An Acquisition Technical Services work order is created.

7. Select Attach to Request from the row actions list. A dialog box appears, where you select the request’s title to attach.
8. Select the check box for the title, and select 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).

Supporting Personal Delivery for Requests

To configure Alma to support personal delivery for 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 Ful Personal Delivery Letter is sent to the patron.

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

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.
- 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.
- 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.

Alma checks whether there is personal delivery desk with a hold shelf when a request is activated—that is, when placing a
request with personal delivery for an available item, the personal delivery desk must have a hold shelf because if the loan fails to be activated (for example, because of a block), the item remains on the hold shelf.

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

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

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

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

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

Note

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

A fulfillment network has the following additional attributes:

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

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

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

Viewing Network Activities

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

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

Pick Up Anywhere Workflow

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

Requesting an Item for Pickup Anywhere in the Network

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

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

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

The item is scanned by the institution that owns the resource, the pick-up destination is shown and the item put into transit from the institution that owns the resource to the pick-up institution.
The item is received and scanned at the pick-up institution with the owning institution selected.

Scan in at Ownership Institution

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

Scan in at Pickup Institution

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

Loan at Pickup Institution

When the patron returns the resource to the pickup institution, the item is scanned as usual with the resource owning institution selected on the Manage Item Returns page. The Manage Item Returns interface indicates that the next step for the item is to transit back to its owning institution.
Get It at Other Institutions

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

When the institution is part of a network, Primo will expose the discovered record’s inventory at the patron’s institution, as well as at other institutions of the network. The home institution’s inventory and the network institutions’ inventory are displayed in separate sections, as shown below.

Other institutions’ inventory may be displayed without allowing the patron to directly request the other institutions’ resources. For example, if the institution implements a resource sharing or automated fulfillment network, network requests are placed via the resource sharing link.
Alternatively, the institution may allow the patrons to navigate into the other network members’ inventory information and directly place a request.

Below are some of the service types an institution may set up for network requesting.

**Expose other institutions’ availability only**

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

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

Require manual linked account registration

It is possible to set Alma so that when the patron chooses to display a remote institution’s Get It information, the default view will be as for a non-logged user. Alma will not automatically create a linked account at the remote institution, and will therefore not display detailed terms of use and will not show a request option. A ‘Register’ option will allow the patron to explicitly request to create a linked account.

This type of set up may be done in order to make sure that linked accounts are only created when the patron explicitly requests to create them. This may serve privacy considerations, as well as prevent multiple linked accounts from being created unless the patron really wants to create a local request.

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

### Allow automatic linked account registration

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

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

As part of the fulfillment process, the Circulation Desk Operator/Manager selects a patron (see Selecting a Patron) 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 Viewing a Patron's Requested Items).

- **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).

- **Returns** – The patron returns the loaned item. The barcode is scanned at the circulation desk (see Returning Items). 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). Email and/or SMS notifications may also be set up to notify patrons of their fines and fees (see Sending Patron Notifications for Fines and Fees).

- **Editing patron information** – The Circulation Desk Operator/Manager can make changes to patron information (see Editing Patron Information).

You can create relationships between libraries to enable the libraries to check in and check out items for each other (see Configuring Fulfillment Services Between Libraries Within an Institution).

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

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**
For more information on the User Notes tab, see [Adding Notes to Users](#).

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 selecting Done; returns to the Patron Identification page to enable searching for another patron (see [Selecting a Patron](#)).

You can do the following on the Patron Services page:

- Select **Renew All** to renew all items that the patron currently has on loan. The system displays an informational message and sends the Borrowing Activity Letter with the updated due dates, where relevant.
- Select **Renew Selected** to renew all items that are selected on the loan display. The system displays an informational message and sends the Borrowing Activity Letter with the updated due dates, where relevant.
- Select **Refresh Blocks/Notes** to update the notes and check the relevancy of any blocks - whether loans have been returned and the block should be lifted or new loans have been added and a block is newly applicable.
- Renew the patron if the patron's card has expired. When this happens, Alma displays a block that the patron's card has expired. To renew the user, click **Renew** within the block. The renewal period is determined by the User Registration Terms of Use (see [Configuring Terms of Use](#)).
- If the patron has a social account attached, select **Detach from Social Account** to disassociate the social login from the patron.
- Select **Edit User Info** to open the Quick User Management page and edit the patron’s information. For details on the fields displayed on this page, see [Quick User Management Page Fields](#) below.
- Select **Send Activity Report** to send the Borrowing Activity Letter to the patron, which lists patron activity, including loans, overdue items, and active fines.
- Select **Send Return Receipt** to send a return receipt to the specified patron for items returned to the circulation desk during the current session. For details on configuring the sending of receipts automatically, see the relevant field descriptions in [Circulation Desk – General Information Fields](#) in [Configuring Circulation Desks](#). For details on customizing the Return Receipt Letter, see [Configuring Alma Letters](#).
- Select **Send Loan Receipt** to send the Loan Receipt Letter to the specified patron for items borrowed at the circulation desk during the current session. For details on configuring the sending of receipts automatically, see the relevant field descriptions in [Circulation Desk – General Information Fields](#) in [Configuring Circulation Desks](#). For details on customizing the letter, see [Configuring Alma Letters](#).
- Select **Send Requests Report** to send the Full Requests Report Letter to the specified patron listing all requested items, broken down by Not Active, In Process, and On Hold Shelf.
- Select **Submit Request** to create a request, automatically populating the request with this user’s data. A physical item will have three options for the type of request to be created: Patron Physical, Booking, and Digitization. An electronic item will have an option for Document Delivery. After submitting the request, the user is again returned to the Patron Services page on the Requests tab. You can type in the title or ISBN/ISSN that you want to request, and an
auto-complete will suggest possible matches. If the title you are looking for is not automatically suggested, you can use the search tool to conduct a full search.

For more information about the Submit Request function, see the Place a Request from Manage Patron Services video (1:18 mins).

• Select the link to add or view patron notes. If there are no notes for the patron, the link is Add Note. The link is Edit Notes if there are between one and five notes. If there are more than five notes, the link is More User Notes Exist.

• Select the Loans tab to view the patron loaned items. For details, see Loaning Items.

• Select the Returns tab to view the patron returned items. For details, see Returning Items.

• Select the Requests tab to view the patron’s requested items. The patron’s requests are displayed. For details, see Viewing a Patron’s Requested Items.

• The Patron Services page is set by default to time out after two minutes of inactivity. Optionally, you can configure the Patron Services page to time out between 1 - 30 minutes by modifying the patron_services_timeout_minutes setting on the Customer Parameters Mapping Table page (see Configuring Other Settings).

• A circulation desk role’s ability to view all of a patron’s return history is determined by a configuration preference set during implementation (the default is to view all). If required, work with your Ex Libris Professional Services/Support representative to customize this option differently, for your specific institution’s needs.

For more information about adding the Call Number to fulfillment pages, such as the Loans display above, and selected letters, Watch the Call Number Added to Fulfillment Pages and Letters video (1:02 mins).

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).

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

• **Go To Return Items** – Return patron items (see To return multiple items).

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

• **Register New User** – Register patrons; see Registering Patrons. Note that this should be used for patrons only and not staff users.

To select a patron whose services you want to manage:

On the Patron Identification page (Fulfillment > Checkout/Checkin > Manage Patron Services), enter or select a patron name in the Scan patron’s ID or search for patron field.

Note

Before selecting the magnifying glass in the search box, a drop-down list appears. The first ten matching items are retrieved for the list. They are not necessarily the same as the first ten items on the complete patron list. For a full search, use the magnifying glass.
To see a list of recent patrons, select the clock icon.

If the user is acting as a proxy for another patron (see Managing Proxy Users), select **Use proxy** and select **Go**. The **Proxy for** field appears. Select the patron for whom this user is acting as a proxy and select **Go** again. This patron receives email notifications regarding actions taken on his/her behalf.

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

The **Patron ID** field saves the list of patrons entered during the current session, so that you can select from recent patrons each time you access the page. Due to privacy concerns, this recent list is emptied each time you log out.

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**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 can search for and retrieve the patron’s information from the user’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.

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:**

On the Patron Identification page (**Fulfillment > Checkout/Checkin > Manage Patron Services**), select **Register New User**. The Quick User Management page appears. Follow the instructions in **Adding Users**. When you are done, select **Update User**.

The Quick User Management page is slightly different when accessed by selecting **Register New User** on the Patron Identification page than it is when adding a user from the Manage Users page, as follows:

<table>
<thead>
<tr>
<th>Section</th>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Information</td>
<td>Primary identifier</td>
<td>A generated value is prefilled in this field. See <strong>Configuring User ID Generation</strong>. You can change the value.</td>
</tr>
</tbody>
</table>
| User Management Information   | Patron has institutional record | Whether the patron is external or internal. Possible values are:  
• **Yes** – The patron is external and information is updated by the SIS synchronization process.  
• **No** – The patron is internal.  
If you select **Yes**, the **Owning system** field appears. The options that appear are the names of the configured SIS profiles (see **Student Information Systems**). |

**Note**

Users are normally managed as external users by an external system, such as the Student Information System. External user records are synchronized with Alma using the **User integration profile**. Internal users are defined (see **Managing Users**) for users that are not managed in an external system. For example, internal users can be defined for community patrons who are not students, or for alumni. For an in-depth explanation of user management in Alma, see the **Development Network**.

Institutions whose Student Information System (SIS) does not offer authentication services, can create users as external in Alma, but assign passwords for them directly in Alma. In this case, all the user information is managed from the SIS, but the passwords are stored in Alma and managed by the Ex Libris Identity Service. For these users, the "Password" field remains available in this section. To activate this
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), first check to see if the patron was already registered. Search for the patron ID.

   ![Search for Patron in Local Institution](image)

   If the patron’s ID is found, proceed with the loan on the Patron Services page. Otherwise, continue to the next step.

2. Search for the ID at the patron’s home institution:
   1. Select **Find user in other institution** to open the Fulfillment Network search fields. Note that check box only appears if your institution is part of a fulfillment network.

   ![Search for Patron at Another Institution](image)

   2. Select the patron’s home institution in **Institution**.
   3. Enter patron search criteria in the field labeled **Scan patron's ID or search for patron**. Valid search criteria include patron ID, first name, last name, or email address. The searchable identifiers can be configured by an admin; see **Configuring Searchable User Identifiers**. The search must be an exact match. If the search yields more than one result, an error is returned. If the search is successful, the available fields are populated. The patron’s local ID will be their primary ID at their home institution.

**Note**

- To search for a patron by fields other than patron ID, ensure that **fulfillment_network_search_by_all** is set to **true**.
- If an institution has defined hidden identifiers, these identifiers are not used for searches in a fulfillment network unless **fulfillment_network_search_by_all** is set to **true**. For more information, see **Configuring Other Settings**.
4. Select **Find User**.

5. The Quick User Management page appears and displays the patron’s contact information, which was retrieved from the patron’s home institution. Enter the patron’s ID in **Primary identifier**. For more information, see Adding Users.

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**Note**

In a fulfillment network containing members of a Network Zone, Alma may be configured to copy automatically primary identifiers (and other identifiers, such as barcode) from the user’s home institution.

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3. Select **Update User** to create the register the patron for your local institution.

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

**To import a patron from a student management system:**

1. Configure the integration profile with the online import fields as detailed on the **Student Information Systems** page.

2. When the integration profile is configured, **Import user from User Management System** appears on the Patron Identification page (**Fulfillment > Checkout/Check-in > Manage Patron Services**). Search for a patron’s ID on the Patron Services page. If the ID is not found, select this field.

![Online Import](image)

3. Scan or type the patron’s ID from the the student management system in the **User Identifier** field.

4. Select **Find User**.

5. If the ID is found in the student management system, the Quick User Management page appears and displays the patron’s information that was retrieved.

6. Select **Update User** to create the patron in the local institution’s Alma. The Patron Services page appears, enabling you to manage patron services.

7. If the patron’s ID does not exist in the external system, select **Save** to locally register the patron. The new patron information will be transmitted to the student management system.

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**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). The Patron Services page opens.
2. On the Patron Services page, select the Edit info link. The Quick User Management page opens. Follow the instructions in Adding Users, or select Full Information and follow the instructions in Editing Users. You cannot edit the primary identifier or any other user identifier.
3. Select 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), 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 selecting Create Item (appears if you have the Physical Inventory Operator role – see To create a new item to be entered into the repository).

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

For institutions in a fulfillment network or Network Zone, loans belonging to another institution may be seen in the Network Activity tab. For more information, see Viewing Network Activity.

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

Depending on the Reloan Limit policy, an item that was just returned by a patron may not be immediately reloanable to the same patron. Depending on the policy chosen, you may receive a block message when the loan is attempted. A different copy of the same title with the same material type is considered as a single item for this policy. For serial items, the limit only applies to items with the same description. If the policy is set to none or the time frame for reloaning has passed, the loan will successfully execute. See Reloan Limit.

To loan a requested item:

1. On the Patron Services page (see Selecting a Patron), select 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 select Create Item (appears if you have the Physical Inventory Operator role) 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.

2. Choose an item and select Select. The item's barcode is displayed in the Scan item barcode field.
3. Select OK. The item details are displayed in the 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).

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 last closing hour of the library before the patron’s record expires.

To change the due date when it extends beyond the end of a semester and must be shortened to the end of the semester, see How to Make Items Have Due Dates at the End of the Semester.

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

The default for the Loan display drop-down list is determined by the remember_last_loan_display parameter (see Configuring Other Settings).

- All – displays all items that have been loaned to the patron. When All Loans is selected, an option exists to sort on the Library column.
- This session – displays items that have been loaned during the current session.

5. For the relevant loan, select from the following options in the row actions list:

- Work order – Creates a request; you can select a work order or other request. See step 2 in To create a request.
- Delete loan – Deletes the item from the Loans tab. The item’s status changes to Missing (for lost loans) or In Place (for other loans).
- 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).

Note

- You cannot change the due date on a loan if a calendar is not defined for the specified library.
- If the new due date is after the expiry date of the patron, the date is altered to match the patron expiry date. When this happens a warning message appears to inform you that the due date has been changed. In order for the warning message to display, shortened_due_date_notifications must be set to MESSAGE or MESSAGE_EMAIL. For more information, see Configuring Other Settings.

- View notes – View notes on the loan (see Viewing Loan History).
**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 Terms of Use associated with the item, as well as the due date and overdue fine information. For details, see Viewing Fulfillment Configuration Information.

**Loan history** – View a history of the loan (see Viewing Loan History).

**Renew** – Renew an item (the Loan Status field value is updated to Renewed).

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**Note**

- If you renew an item before its due date, the new due date is calculated from the date of renewal and not from the previous due date. For example, if an item is due on July 15 and is renewed on July 10, the new due date is calculated from July 10, according to the TOU.

- 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.

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**Claimed Return** – Claim an item as returned (see To claim an item was returned). When claiming an item as returned:

- The loan’s status is changed to Claim Returned.

- The item’s Process Type value is Claimed Returned, and the item remains requestable and is considered to still be on loan.

- By default, overdue fines accumulated prior to the item being claimed as returned are applied to the patron’s active balance, but no new overdue fines accrue from that point onward. (This functionality, however, can be configured using the overdue_at_claim_return_loan parameter. For details, see Configuring Other Settings.)

**Lost** – Specifies that an item is lost and charges the patron (see To indicate a lost item). Ensure that the value of the Loan Display drop-down list is All. Select 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).

6. Before moving to the next patron, or next activity at the circulation desk, you must select Done to end each patron session. You are returned to the Patron Identification page.

7. If the Create Loan Receipt checkbox in the circulation desk is selected (see Adding a Circulation Desk) and a loan was performed, a Loan Receipt Letter is sent. If the Send Loan Receipt checkbox is selected, a Loan Receipt letter (letter code: FulLoanReceiptLetter) is sent to the specified patron for items borrowed at the circulation desk during the current session. For details on configuring the sending of receipts automatically, see the relevant field descriptions in Circulation Desk – General Information Fields in Configuring Circulation Desks. If the loan status or the due date has changed, a Loan Status Notice Letter is sent to the patron. For information on customizing letters, see Configuring Alma Letters.

Columns displayed on the loans grid may be selected by selecting on the Columns button above the grid.

The columns that display by default are:

- Title
- Due Date
- Barcode
- Fine
- Loan Date
- Loan Status - possible values are: Normal, Normal (with user), Normal (on shelf), Recalled, Lost, Claim Returned,
Renewed, Renewed (with user) and Renewed (on shelf)

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**Note**

The statuses followed by (with user) or (on shelf) are applicable to reading room loans. For more information, see [Configuring Loan Status Names](#).

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- Item Policy
- Library
- Loan Notes

The columns that are hidden by default are:

- Call Number
- Loaned at Library
- Loaned at Desk
- Last Renew Date
- Last Renew Status
- Accession Number
- Item Call Number
- Author
- Publication Year
- Location

To create a new item to be entered into the repository (can be performed if you have the Physical Inventory Operator role):

1. On the Patron Services page (see [Selecting a Patron](#)), select the Loans tab.
2. Select Create Item. The Choose Holding Type dialog box appears.
3. Choose the holding type and, where relevant, the citation type, and select Choose. The Quick Cataloging page appears.
4. Configure resource and item information and select Save. For information about the fields, see Adding a New Book or Journal Article. 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.

An Acquisition Technical Services work order is created. For an in-depth overview of work orders, see Physical Inventory - Defining and managing work orders in Alma. Note that Alma does not submit a request for the item to be picked from the shelf, since the item is going out on a loan. It will be going into work order when it returns.

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

1. On the Patron Services page (see Selecting a Patron), select the Loans tab.
2. Select the loan whose due date you want to change and select Change Due Date. The Select Due Date dialog box opens.
3. Select 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 Fulfillment Policy Types.)

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

A Loan Status Notice Letter email is sent to the patron with the new due date and saved as an attachment to the user record.

6. 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 Selecting a Patron), select 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 Lost from the row actions list. The Lost Item dialog box opens with the fine/fee information.
4. Select 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).

**To claim an item was returned:**

1. On the Patron Services page (see Selecting a Patron), select 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 Claimed return from the row actions list. The value of the Loan Status column changes to Claimed returned.

**To view loan notes:**

1. On the Patron Services page (see Selecting a Patron), select 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 View notes from the row actions list. The Loan Notes page opens. For more information on adding, editing, and deleting notes, see Notes Tab.
### 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 [Selecting a Patron](#)), select the **Loans** tab.
2. In the **Loan display** drop-down list, select **All**.
3. Select **Loan history** from the row actions list for an item. The Loan Audit Trail page appears, displaying the actions taken on the specified item.

![Loan Audit Trail](image)

#### Loan Audit Trail Page

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

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
<th>Action Column Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Normal</td>
<td>Indicates that the item was checked out. This is an item’s initial status.</td>
<td></td>
</tr>
<tr>
<td>Recalled</td>
<td>The item was recalled by the library</td>
<td></td>
</tr>
<tr>
<td>Renewed</td>
<td>The item was renewed by the patron</td>
<td></td>
</tr>
<tr>
<td>Lost</td>
<td>The item has been declared lost, based on the configured lost loan profiles (see <a href="#">Configuring Overdue and Lost Loan Profiles</a>)</td>
<td></td>
</tr>
<tr>
<td>Lost with overdue charge</td>
<td>An overdue fine was incurred when the item was declared lost</td>
<td></td>
</tr>
<tr>
<td>Claim returned</td>
<td>The user claims to have returned the item</td>
<td></td>
</tr>
<tr>
<td>Claim returned with overdue charge</td>
<td>An overdue fine was incurred when the item was claimed returned</td>
<td></td>
</tr>
<tr>
<td>Reading room with user</td>
<td>The resource is in the library, in use by a user (patron)</td>
<td></td>
</tr>
<tr>
<td>Reading room on shelf</td>
<td>The resource in the library, on the shelf but reserved for a user (patron)</td>
<td></td>
</tr>
<tr>
<td>Web change forward</td>
<td>The loan’s due date has been moved forward</td>
<td></td>
</tr>
</tbody>
</table>

**Note**

Loan notes are still visible after the loan is returned.
<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web change backward</td>
<td>The loan’s due date has been moved backward</td>
</tr>
<tr>
<td>Bulk change forward</td>
<td>The loan’s due date has been moved forward by a job</td>
</tr>
<tr>
<td>Bulk change backward</td>
<td>The loan’s due date has been moved backward by a job</td>
</tr>
<tr>
<td>Automatic renewed</td>
<td>The loan was renewed by an automatic renewal job</td>
</tr>
<tr>
<td>Undo return</td>
<td>The SIP2 machine cancels the Check in message</td>
</tr>
<tr>
<td>Undo renew</td>
<td>The SIP2 machine cancels the Renew message</td>
</tr>
<tr>
<td>Item was found</td>
<td>An item declared Lost or Claimed returned has been found</td>
</tr>
<tr>
<td>Loan</td>
<td>The loan was initiated for the item</td>
</tr>
</tbody>
</table>

**Note**

The Operator column appears only for managers and administrators. See [Configuring Users’ Ability to View Operator Details](#).

## 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.

![Lost Item Management Diagram](image-url)
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:

   1. On the Patron Services page (Fulfillment > Checkout/Checkin > Manage Patron Services), locate the patron that borrowed the item and select *Lost* from the row actions list for the relevant item.

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

2. You can search for items marked as lost by performing an advanced search in the repository. Select the Advanced Search link and in the Physical Items column, select Process Type. On the Advanced Search page, select *Equals* and *Lost* in the drop-down lists and select Go. For details on advanced searches, see Performing an Advanced Search.

You can also configure the following:

- Lost items can be excluded from appearing in repository searches (configurable in Configuration Menu > Resources > Record Export > Exclude Process Types from Publishing). For details, see Excluding Resources with Specific Process Types from Publishing.

- Lost items can be configured as searchable but not as requestable. This is done on the Fulfillment Rules Editor page (Configuration Menu > Fulfillment > Physical Fulfillment > Fulfillment Units, select Edit from the row actions list for a Fulfillment Unit and select the Fulfillment Unit Rules tab). For details on configuring Fulfillment Unit Rules, see To add fulfillment unit rules.

3. You can configure policy types for lost loans which determine how lost loans are handled. Parameters are configured in Fulfillment Configuration (Configuration Menu > Fulfillment > 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.

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

5. If the close_paid_lost_loan parameter is set to true, when an on loan item's status is changed to *Lost* and the last lost or replacement fee is closed, the loan status is changed to *Lost and paid* and the loan is removed from the active loans list (see Configuring Other Settings (Fulfillment)). You can close lost loans by running the Close lost loans job (see Running Manual Jobs on Defined Sets). This job closes all loans in the fulfillment set. Any fines or fees associated with the loan remain on the patron's record. If a lost item is returned after the loan has been closed, the patron is not refunded for the replacement fee.

   **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, see Requests – Recalculate after Inventory Update in Viewing Scheduled Jobs.
Returning Items

When an item is returned, you scan its barcode and return it to its proper location, which may be in a different institution.

Managing item returns enables you to view the loan and usage history of returned items. This information is collected when its barcode is scanned. If the barcode cannot be read, you can search for the item. Note that if the item does not have a barcode, you must first assign a barcode to the item record before scanning in or returning the item. Barcodes are required in order to circulate items or move them within the library using the scan in or return features.

Loan and usage history information is available in Analytics reports (see Users) and in the More Info dialog box for imported records (see the More Info description in Viewing Imported Records).

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)
- Bulk – For items loaned to more than one patron; used to streamline operator workflow and enhance productivity (see To return multiple items)

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

Usage history information can be viewed in the returns tab if the All Returns filter is selected. Note that:

- The privilege to view a patron’s usage history may be disabled by Ex Libris. Please contact Ex Libris support if you would like to disable this privilege.
- Loan history may be anonymized. It is possible to configure how loan records will be anonymized by using the Loan Anonymization Rules. For more information, see Configuring Anonymization.

The Resource Sharing Return Slip Letter is printed when returning a borrowing item to the lender. For more information, see Configuring Alma Letters.

Note

For detailed information on in-house loans, see In-House Use and Alma Analytics Reports for In-House Use.

Alma can be configured to allow a patron to return items to any member of a fulfillment network, regardless of the institution from which the patron checked out the item. This feature is called Return Anywhere. For example, if University A and University B are members of the same fulfillment network, a patron could check out a book at University A and check it in at University B. See Fulfillment Networks.

Accepting items for return from a different institution is available only if your institution is a member of a fulfillment network and has a Circulate For relationship to another member of the network (see Configuring Fulfillment Relationships). When the return is entered, The Ful Transit Slip Letter is printed at the institution accepting the return. The returned item is sent to the originating institution and marked as In Transit.

For more information about returning items from different institutions in a fulfillment network, see the Return Anywhere video (2:35 mins).

When items are loaned to 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 Managing Proxy Users.

When returning a requested item on a self-check machine, there is no resource request slip generated.
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)
- The item was lost (see To indicate a lost item)

**To return an individual item:**

1. On the Patron Services page (see Selecting a Patron), select the **Returns** tab.
2. From the **Returns display** drop-down list, select one of the following:
   - **All** – displays all items that have been returned by the patron
   - **This session** – displays items that have been returned during the current session
3. Scan or enter the barcode or select

![barcode](image)

and select the item being returned, and select **OK**. The item details are displayed.
4. For the relevant loan, select from the following options in the row actions list:
   - **Work order** – Creates a request; you can select a work order or other request (see step 2 in To create a request)
   - **Loan history** – View the audit trail of an item’s loan history (see Viewing Loan History)
   - **View notes** – View notes regarding a loan (see To view loan notes)
   - **View queue** – View the queue of requests for an item
5. Select **Done**. You are returned to the Patron Identification page. If the **Creates return receipts** check box in the circulation desk is selected (see Adding a Circulation Desk) and a return was done, a return receipt will also be sent.

Columns displayed on the returns grid may be selected by selecting on the **Columns** button above the grid.

The columns that display by default are:

- Title
- Return Date
- Due Date
- Barcode
- Fine
- Loan Date
- Owned By Library

The columns that are hidden by default are:

- Call Number
- Accession Number
- Item Call Number
- Author
- Publication Year

**To return multiple items:**

1. Open the Manage Item Returns page (Fulfillment > Checkout/Checkin > Return Items).
2. Scan or enter the item barcode in the **Scan item barcode** field, or select
and select the item from the displayed list.

3. 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*).
   - **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*).

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

4. Select **OK**. The item details are displayed on the Manage Item Returns page.

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*).
- **Alt + Ctrl + C** – Clears the list of returned items
- **Alt + Shift + X** – Returns to the Alma homepage

5. If needed, modify the return date. One reason to modify the return date would be for items that were returned in an overnight drop box during the prior day. The date is modified as follows:

   1. On the Manage Item Returns page, select **Override return date and time** and select the return date and time.
   2. Select **Apply**. The return date and time is changed on the Manage Item Returns page.

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

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**Note**

If your institution is part of a fulfillment network and has a Circulate For relationship with another institution, an item for that institution may be scanned in from this page as well. In this case, a check box, **Item from another institution**, will be displayed. Select the check box and select the item’s originating institution from the Institution drop-down list.
6. If required, select one of the following options from the row actions list:
   - **Work order** – Creates a request; you can select a work order or other request (see step 2 in To create a request)
   - **Loan history** – Displays an audit trail of an item’s loan history (see Viewing Loan History)
   - **View notes** – Displays notes on the loan (see To view loan notes)

7. Select **Exit** to exit the page, or select **Go to Patron Services** to open the **Patron Identification** page.

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**Viewing Fines and Fees and Receiving Payments**

Patrons may incur fines and fees for many reasons. Circulation desk operators view and receive payments for patron fines and fees on the **Fines and Fees** tab on the **User Details** pages (see Viewing a Patron’s Fines and Fees and Receiving Payment for Fines and Fees).

If payments are made online using the WPM Education e-payment system, circulation desk operators may need to manually record any transactions that patrons paid directly to the WPM Education e-payment system. 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.

After a payment is received from a patron, Alma sends the Fine Fee Payment Receipt Letter to the patron. To configure the message, see Configuring Alma Letters.

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**Viewing a Patron’s Fines and Fees**

The **Fines and Fees** list below displays 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/Checkin > Manage Patron Services), enter the patron’s name in the Scan patron’s ID or search for patron field and select Go.

   The Patron Services page appears.

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

   The **Fines/fees** tab on the User Details page appears, which lists all fines and fees for a patron.

   For institutions in a fulfillment network, fines and fees for loans belonging to another institution may be seen in the Network Activity tab. For more information, see Viewing Network Activity.
The Fines and Fees Summary area displays amounts for:

- Active balance
- Disputed balance
- Transferred balance
- Currently filtered balance
- Currently filtered disputed balance

For details on adding fines and fees, see Assigning Fines/Fees to Users.

3. Select Save or Cancel to return to the Patron Services page.

Sending Patron Notifications for Fines and Fees

Libraries can set up notifications to users about fines/fees. See Configuring Fines/Fees Notifications. The notifications are sent by the Fines/Fees Notifications job. See Configuring Fulfillment Jobs.

Receiving Payment for Fines and Fees

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

To receive payments:

1. On the Patron Identification page (Fulfillment > Checkout/Checkin > Manage Patron Services), enter the patron’s name in the Scan patron’s ID or search for patron field and select Go. The Patron Services page appears.

2. Select the Pay link to the right of the Active balance link. The pay link appears only when the operator is connected to a circulation desk (see Library/Desk Selector in The Persistent Menu).

The Payment Details dialog box appears with the All Fines radio button selected as a default. This selection displays the entire outstanding balance in the payment amount.
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.

1. Select the Browse icon to specify the specific fines to be paid. The User Fines and Fees page appears. You can filter the fines and fees display to show only fees for a specific fee owner in the **Fee Owner** filter.

2. Select the check boxes of the fines and fees that you want to pay and select **Select**. The balance of the selected items displays in the **User balance** field.
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, Debit Card, or Online). For information on online transactions, see Recording Online Payments Manually.

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. Select Send and then select Confirm in the Confirmation message dialog box to pay for the fines. The Patron Services page appears and displays the updated 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.
- Web service – See https://developers.exlibrisgroup.com/alma/apis/users

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**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 enables 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 select Go.

   The Patron Services page appears.

   Pay Link on Patron Services Page

2. Select the Pay link. The Payment Details dialog box appears.
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. Select Send.

Viewing a Patron's 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 select Go, or select a context in which to search from the Request Type or Task filter.

For institutions in a fulfillment network, items on the hold shelf belonging to another institution may be seen in the Network Activity tab. For more information, see Viewing Network Activity.

Patron Services Page – Requests Tab

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

- To edit the request, select Edit from the row actions list. The Create Request page opens, enabling you to edit the request’s parameters (see Creating a Request).
- To cancel the request, select Cancel from the row actions list.
- To update the expiration date of the request, select Update Expiry from the row actions list.
- To view this title in the context of the search screen, select View title in search from the row actions list.
Resource sharing requests with multiple items will show a line for each of the items received. In contrast, the Primo My Account request list shows only one line item per request. This is because Primo displays only the resource sharing request, regardless of how many items shipped to fulfill the request, while Alma displays all the items to the operator that are on shelf or in transit. For more information, see Resource Sharing Requests with Multiple Items.

Columns to be displayed on the requests grid may be selected by selecting on the Columns button above the grid.

The columns that display by default are:

- Title
- Request Type
- Request Date
- Start Time
- End Time
- Expiry Date
- Task
- Process Date
- Managed By
- Place in Queue
- Resource Sharing Request

The columns that are hidden by default are:

- Library
- Location
- Call Number
- Author
- Publication Year
Automated Fulfillment Network Requests (AFN)

Requests between institutions in a fulfillment network can be handled within a resource sharing framework. A borrowing request is created by the patron in Primo or the operator in Alma. Alma then creates a rota of all the institutions that have the requested item. The rota may include institutions which will handle the lending request as a fulfillment network request, i.e. a regular hold request, as well as institutions that will handle the lending request as a classic resource sharing request, i.e. a lending request. If the first institution on the rota rejects the request, Alma automatically moves through the list, forwarding the request to the next institution in line. If the chosen lender institution is part of the fulfillment network, the request at the lender side is included in the Pick from Shelf task list on the Pick Up Requested Resources page as a regular hold request that is linked to the requesting patron linked user account. For the resource sharing request to be considered a fulfillment network request, the request must be placed from a Network Zone search scope.

Note

For the resource sharing request to be considered a fulfillment network request, the request must be placed from a Network Zone search scope.

Using the resource sharing framework for fulfillment network requests offers the following benefits:

- The borrowing institution does not maintain the request. Although a patron may place the request on the borrowing institution's Primo system, the request passes through without human intervention.
- The lending institution manages these requests in a single queue on the Pick Up Requested Resources page.
- The pickup anywhere and return anywhere functions can still be used with this process. See Fulfillment Networks.
- The pickup location includes all libraries within an institution.

Fulfillment Network Partner Configuration

To include fulfillment network partners in a resource sharing rota:

1. Create the fulfillment network partner in resource sharing partners.
   a. Set the Profile Type to Fulfillment Network.
   b. On the Parameters tab, enter the Alma customer code and URL of the partner.
2. Create a locate profile for the partner library with the Type set to Fulfillment Network. For more information, see Adding Locate Profiles.
   a. In the locate profile parameters, enter the partner's Alma URL and institution code.
   b. If selecting the Check item requestability check box on the profile parameters, then the locate process will check the requestability of the lenders' items. The Is Requestable policy is consulted instead of the Is Requestable for Physical Resource Sharing and Is Requestable for Digital Resource Sharing policies that are used in other resource sharing situations. Note that the requestability check is done without a given user group, so that Fulfillment Unit rules that make use of user group as an input parameter will not match during the locate process. If the lender side has defined a user group in the default_user_group_for_fulfillment_network_locate parameter, Alma uses that user group for the
requestability checks. For more information, see Adding Fulfillment Policies.

When the partner configuration is completed, three fields will appear on the Primo resource sharing request form.

![Primo Resource Sharing Request]

**Primo Resource Sharing Request**

The Preferred Pickup Institution and Preferred Pickup Location fields allow the patron to select any location within the fulfillment network for pickup of the requested item. If the requested item cannot be delivered to the preferred pickup location and the patron deselects the Allow Other Library check box, the item will be delivered to a library at the patron's home institution, as defined in the Preferred Local Pickup Location field. Leaving the Allow Other Library check box checked allows the item to be sent to another library within the preferred pickup institution. If the partner is unable to send the requested item to the local pickup location, Alma will check for the next partner in the rota, which could be a fulfillment network institution or a resource sharing partner, that is able to deliver the requested item to the pickup location.

The rota creation is determined based on the following criteria (in this order):

1. The library defined by the patron as the preferred pickup location.
2. Another library on the same campus as the preferred pickup location.
3. Another library in the same institution as the preferred pickup location.
4. Another fulfillment network partner that has a Deliver To relationship configured for the preferred pickup location.

This way, partners that have a higher chance of being able to fulfill the request for pickup at the preferred institution are automatically pushed up the rota.

When a request is successfully processed, it appears in the borrowing task list of the patron's home institution. If the request was sent to a fulfillment network partner, the lending partner will see the request in the Pick from Shelf task list. If the user did not already have an account in the partner's system, a linked user account is also created. When the partner puts the requested item on the hold shelf, the status of the borrowing request is automatically set to Completed.

When the hold request is created on the lender's side, the **Date Needed By** field on the hold request is populated with the partner's requested expiration date. If **No Expiry** is selected, the date needed by remains empty. If **Expire by Interest Date** is selected, the **Date Needed By** field is populated with the due date of the borrowing request. If **Expiry time** is selected, the **Date Needed By** is the current date, plus the chosen number of days.

For more information on fulfillment network requests, see the [Automated Fulfillment Network](#) video (10:57 minutes).

---

**Workflow Use Case 1**

A patron from West University will request a resource managed at the Network Zone. The items are located at East University. The request for pick up is at East University.

The requesting patron, Demo 1, is a patron at West University, but not at East University.
Patron Not Registered at Pickup Institution

The patron logs into Primo from his home institution, West University. He uses the Primo search to find a resource that is owned by another member in the network. The search is conducted in a shared scope.

The Primo request form allows the following pickup location options:

- The Preferred Pickup Institution can be any institution in the fulfillment network.
- The Preferred Pickup Location can be any library from the selected institution.
- Allow Other Library allows pickup at another library within East University if the Science Library cannot fulfill the request.
- Preferred Local Pickup Location is a library at West University where the item will be sent if pickup from the preferred library is not possible.

After the patron creates the request, a corresponding resource sharing request is created for West University with a rota that includes East University.

Borrowing Request
Borrowing Request Rota

The rota includes another ISO partner to whom the request will be forwarded if the fulfillment network request fails.

Note that if the pickup location is not the home institution, Alma automatically manipulates the rota so partners that can fulfill requests at the preferred pickup location will be pushed up. For example:

If the preferred pickup location is the Science Library at East University, that partner record will be pushed to the top of the rota. This partner is most likely to fulfill the request at the preferred pick up location while requiring the least transit logistics.

If the pickup location is not the home institution, Alma automatically manipulates the rota. The order of preference is found above.

The linked account is created for patron Demo1 at East University, and a hold request is created.

Patron Registered at Pickup Institution

Hold Request at Pickup Institution

The item is picked off the shelf and put on the hold shelf at the Science Library.
When the request is placed on the hold shelf by East University, it is considered complete at West University.

The rest of the process is a standard fulfillment network loan. East University will loan the item to the West University patron.

When the item is returned, it is reshelved.

Borrowing Request at Originating Institution

Patron Identification for Visiting Patron

Patron Loan at Pickup Institution
Workflow Use Case 2

A patron from West University requests a resource that is managed at the Network Zone and has items at East University for pickup at West University.

The patron logs into Primo at his home institution, West University, and uses the Primo search to find a resource that is owned by another member in the network. The search is conducted in a shared scope.

The requesting patron, Demo2, is a patron at West University but not at East University.

The Primo resource sharing request form is used to request a pickup at a library of the home institution, West University.

A new resource sharing request is created at West University. East University is included in the rota.
The linked account has been created for patron Demo2 at East University, and a hold request is created.

When the item is picked off the shelf and scanned in, it is put in transit to the pickup location at West University.
When the request is received at West University, it is put on the hold shelf.

Once the requested item is on the hold shelf, the borrowing request is considered complete.

The item is then loaned to the West University patron.
Loan Item to Patron at Originating Institution

The item is then returned by the patron.

Patron Returns Loan

Destination Confirmation Window

The item is then received back at the lending institution and is reshelved.
Workflow Use Case 3

A patron from West University requests a resource that it managed at the Network Zone and has items at East University.

East University rejects the request. The rota will continue to the next partner.

The request is placed as in the prior use cases as a hold request at East University.

The request is a resource sharing request at West University that has been sent to the East University fulfillment network partner.

Reshelve Item at Lending Institution

Resource Sharing Request Rota

Borrowing Request History
The request is a hold request at East University. The staff at East University can cancel the request (for example, because the item is not on the shelf).

Cancel Hold Request

This will cause the rota on the borrower side to move on to the next partner in the rota, which may be another fulfillment network partner, or an ISO partner.

Borrowing Request Rota After Partner Canceled Request

The request is fulfilled by another partner on the rota.

Borrowing Request History
Booking

This section includes:

- Booking Workflow
- Creating Booking Requests
Booking Workflow

A booking request reserves an item for a specific time period. This can be helpful for managing the usage of in-demand items. Booking requests can also be used to reserve study rooms, equipment, and other resources. For more information, see Booking Requests.

The workflow outlines the configuration tasks necessary to implement booking requests, as well as the procedure for booking items in Alma.

1. Invoke the relevant Booking configuration settings, as follows:
   1. **Policies** – Create booking policies to enable parameters for booking requests (see Configuring Fulfillment Policies).
   2. **Terms of Use** – Create booking terms of use to invoke the configured booking policies (see Configuring Terms of Use).
   3. **Rules** – Create rules that indicate which booking terms of use are to be applied for the specified fulfillment unit locations (see Editing a Fulfillment Unit).
2. Create a booking request using one of the following methods:

1. **Repository Search** – The booking request is performed by the Fulfillment Services Operator on behalf of a patron.

2. **Primo** – The booking request is created by the patron.

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.

---

**Note**

Items for which the preview location is different than the owning library should extend their preview period to include both the preview time and the transit time between libraries.

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- **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 Item Policies](#).

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

1. If the item is on loan, it is unavailable until the item’s due date is reached.
2. 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 submitted – see step 3 through step 11 in [Creating Booking Requests](#).

5. The submitted booking request enters the standard request workflow for processing at the shelf. This includes steps for picking up booked items from the shelf and placing them on the hold shelf. If a preview period has been defined in the booking request’s terms of use, the workflow process begins from the preview time and is available on the pick from shelf list at that time. Otherwise it begins with the booking time. The booking request is considered active at the...
point that its workflow process begins. At that point the request will show up in the relevant Pick From Shelf task list if
the resource is available, or be activated when the item is scanned in or returned if the resource was not previously
available. Requests are considered expired when their booking request end time arrives.

Booking requests participate in the standard request workflows and can be seen in the Pick from Shelf and Hold Shelf task
lists. It is not possible to update the expiration of booking requests; the expiration is the booking end time. A booking
request may be placed for pickup at another location if the booking terms of use allows that.

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.

A booking request has higher priority than a hold request. If a hold request cannot be completed considering the hold shelf
period and the loan period, it will not be activated until after the booking request is completed.

---

**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.
Creating Booking Requests

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), create booking terms of use to which you associate the created policies (see Configuring Terms of Use), and then create rules which determine the booking terms of use to be implemented (see Editing a Fulfillment Unit). 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, and there is no other booking request for the time period you are requesting.

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.

To create a booking request:

1. Search for an item for which you want to create a booking request (see Searching in Alma).
2. Select Request for the relevant item. The Create Request page appears.
3. In the **Request type** field, select **Booking request**. The page automatically refreshes and displays the booking request fields.

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.

Whether these fields display depends on the Booking Resolution policy in the Terms of Use. For more information,
see Adding Fulfillment Policies.

9. In the Pickup at field, select a pickup location for the item (from a list arranged alphabetically, by location name).

10. Optionally, in the Additional Request Attributes section, select the Material Type to add to the request. The attribute appears in the Additional Request Attributes section.

11. Select Submit to submit the booking request. The item appears on the Patron Services Page – Requests tab with a Request Type of Booking (see Requested Items).

---

**Note**

- 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.
Resource Requests

This section includes:

- Resource Requests Workflow
- Managing Requests and Work Orders
- Pickup at Shelf
- Scanning Items
- Moving Items
- Managing the Hold Shelf
- Digitization Processing
- Recall Requests
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.

You view and manage created requests related to your department on the In Process Item page (Fulfillment > Resource Requests > Manage In Process Items). For the complete list of all requests for all departments, see the Resource Request Monitoring page (Fulfillment > Resource Requests > Monitor Requests & Item Processes; see Managing Requests and Work Orders).

The types of requests that a user can submit are:

- Booking
- General hold
- Move permanently
- Move temporarily
- Patron digitization request
- Patron physical item request
- Staff digitization request

For details on the types of requests, see Creating a Request.

The following is an illustration of the workflow that governs the way a general resource request utilizes internal staff operations.
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 using 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). The task of locating the item in the institution is given to a Requests Operator (see Managing Requests and Work Orders).

2. A call slip is printed and the item is located and taken from its permanent location (see Pickup at Shelf). Its barcode is scanned (see Scanning Items), 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.

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:
   1. **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).
   2. **Patron** or **Staff digitization request** – The digitization department creates a digital file (see Digitization Processing).
   3. **Move permanently** or **Move temporarily** – An internal request is generated to move the item from one location to another (see Moving Items).

**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 selecting 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:
   1. **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).
   2. **Patron** or **Staff digitization request** – The digitization department creates a digital file (see Digitization Processing).
   3. **Move permanently** or **Move temporarily** – An internal request is generated to move the item from one location to another (see Moving Items).

**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>
<thead>
<tr>
<th>Workflow Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Awaiting Approval</td>
<td>The request is waiting for approval.</td>
</tr>
<tr>
<td>Deposit Item</td>
<td>The digital material is ready to be deposited, but the digital file has not yet been created.</td>
</tr>
<tr>
<td>Digitize Item</td>
<td>The item is ready at the digitization department and is in the process of being digitized.</td>
</tr>
<tr>
<td>Document Delivery</td>
<td>The digital material is in the process of being delivered.</td>
</tr>
<tr>
<td>Hold Shelf Processing</td>
<td>The item is being prepared to be placed on the hold shelf.</td>
</tr>
<tr>
<td>On Hold Shelf</td>
<td>The item is on the hold shelf, but has not yet been picked up or removed.</td>
</tr>
<tr>
<td>Workflow Step</td>
<td>Description</td>
</tr>
<tr>
<td>---------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Pickup From Shelf</td>
<td>The item has been picked up from the hold shelf.</td>
</tr>
</tbody>
</table>
| 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 appears 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 facility item. |
| Work Order Department | The item is in the work order department. |

See [Work Orders](#) for the Alma Essentials Kit session on creating and processing work orders.

When an item that is bound to an active request becomes unavailable, the request will be recalculated to see if it is still relevant (if it can still be fulfilled by another item or later when the item becomes available again). If so, the request will go back to the beginning of its workflow and will wait for an item that can fulfill the request.

Otherwise, the request will be canceled.

Any change that affects the availability of the items can cause the request to be restarted. Examples of some scenarios that can cause an item to become unavailable for a request are:

- Item is loaned to another patron.
- Item is marked as missing.
- Item is withdrawn.
- Item is being updated and it doesn't match the request criteria anymore.

For the list of resource requests, see [Request Statuses](#).
Managing Requests and Work Orders

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

- Fulfillment Services Operator – view requests for any desk in the library
- Requests Operator – view requests that are assigned to your desk(s)
- Fulfillment Services Manager – convert a request to a resource sharing borrowing request (Note that Ex Libris can enable this for the Fulfillment Services Operator and Requests Operator role, as well)

Requests and work orders that have been created and are pending can be viewed and handled on the Resource Request Monitoring page. This page provides updated information on the various types of resource requests, and their progression within Alma. For more information on requests, see Requests in Alma.

For information on completed request reports, see Requests.

You can navigate processes and requests on the Resource Request Monitoring page using the search function, facets, and filtering on the activity status. You can perform actions on the request summaries using the links beneath the request summaries search results.

The Resource Requests Monitoring page displays the results:

![Resource Request Monitoring Page](image)

Note

- When searching for a request in the Find box by Request ID, requests are located according to their ID value.
- It is not possible to search for requests by their External Identifier value. The External Identifier value of requests corresponds to their Internal Identifier value on the Resource Sharing Borrowing Requests page (see Managing Resource Sharing Borrowing Requests).
- For information on searching using special characters/diacritics, see Searching for Special Characters.

The available facets are as follows:
<table>
<thead>
<tr>
<th>Facet</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>The request type, either a process (In Process) or a request (Request).</td>
</tr>
<tr>
<td>Material Type</td>
<td>Material type specified in the request. Options are: Audiobook, Audio cassette, Book, Compact Disc, Flash Card, Bound Issue, Issue, DVD, and Other.</td>
</tr>
<tr>
<td>Workflow Step</td>
<td>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.</td>
</tr>
<tr>
<td>Request/Process Type</td>
<td>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).</td>
</tr>
<tr>
<td>Request Date</td>
<td>For active requests only. The date on which the request was placed. Options are:</td>
</tr>
<tr>
<td></td>
<td>• Today – Requests created on the current date</td>
</tr>
<tr>
<td></td>
<td>• Yesterday – Requests created on the day before the current date</td>
</tr>
<tr>
<td></td>
<td>• Up to three days ago – Requests created two or three days before the current date (excluding today and yesterday)</td>
</tr>
<tr>
<td></td>
<td>• Up to a week ago – Requests created 4-7 days before the current date (in other words, excluding the above three options)</td>
</tr>
<tr>
<td></td>
<td>• Up to a month ago – Requests created between 8 days and a month before the current date (in other words, excluding the above four options)</td>
</tr>
<tr>
<td></td>
<td>• Older – Requests created more than one month before the current date</td>
</tr>
<tr>
<td>Date Needed By</td>
<td>For completed requests, the request date will show the date that the request was completed or canceled.</td>
</tr>
<tr>
<td>Process Status</td>
<td>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).</td>
</tr>
<tr>
<td></td>
<td>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).</td>
</tr>
<tr>
<td>Pickup Location</td>
<td>Library in which item pickup is requested. Options are the institution’s libraries and any configured work order departments (see Configuring Work Order Departments). Home/office delivery requests are indicated by Home Delivery and Office Delivery facets.</td>
</tr>
<tr>
<td>Pickup Institution</td>
<td>The pickup institution in which item pickup is requested.</td>
</tr>
<tr>
<td>Owner</td>
<td>The library whose item is tied to the request. For item-level requests, an Owner is immediately associated with the request. However, for non-item-level requests, this association takes place only when an item is actually scanned in for a request. Prior to this point in time, there is no specific item associated with the request and the Owner is therefore Undefined.</td>
</tr>
</tbody>
</table>

**Handling Processes and Requests**

**To navigate processes and requests:**

1. On the Resource Request Monitoring page (Fulfillment > Resource Requests > Monitor Requests & Item)
Processes), locate a request summary (that is, a search result).

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

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

  On the Request Processing Audit Trail page, values that may appear in the Action column 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** – Open the Create Request page, where you can edit the request/work order. See Creating a Work Order Request.

- **Cancel** – Cancel the request. The requester is notified of the cancelation by email.

- **Update Expiry** – Update the expiry date for the request (see the description in Pickup at Shelf).

- **Mark as Missing** – Update the requested item is missing. Select Yes on the resulting Mark as Missing page.

- **View Title In Search** – Display the title in the context of the repository search screen.

- **Print Slip** – Print a call slip for the requested item. For booking requests, this option only appears if the current date is between the start time and end time of the request. The print slip uses the Ful Resource Request Slip Letter. See Pickup at Shelf.

- **Move to Task List** - Display the page representing the workflow step of the request. For instance, if this request's workflow step is currently On Hold Shelf, display the Active Hold Shelf Items page. This option does not appear when the workflow step is one of the following:
  - TransitItem
  - AwaitApproval
  - CommunicatingWithRemoteStorage
  - HoldShelfProcessing
  - WaitingForRemoteStorage

- **Convert to Resource Sharing** – Convert the request to a resource sharing borrowing request. If there are multiple requests aggregated into a single request, all of these requests are converted with this action.

  For more information about converting hold requests to resource sharing borrowing requests, see the Automatic Conversion of Hold Requests to Resource Sharing Requests video (6:07 mins).

This option appears if:

- The request is a **Hold** or **General Hold** request (request for holding without item)
- The workflow step is **Not Activated**, **Pickup-From Shelf**, or **Waiting for Remote Storage**.
- The user has the Fulfillment Services Manager role (Ex Libris can enable this for the Fulfillment Services...
Operator and Requests Operator role, as well). Note that the role with this privilege must be scoped to the institution level.

This action will succeed if:

- The request's **Date Needed By** has not passed.
- The requested pickup location is supported for resource sharing requests.
- The requested pickup location is a library, not a home delivery or remote institution.

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. For more information, see [The Request Queue](#). 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. 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 appears (that is, the displayed number is based on the item that is the least readily available). 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](#).

Resource sharing borrowing requests with multiple items will list each item separately. In contrast, the Primo My Account request list shows only one line item per request. This is because Primo displays only the resource sharing request, regardless of how many items shipped to fulfill the request, while Alma displays all the items to the operator that are on shelf or in transit. For more information, see [Resource Sharing Requests with Multiple Items](#).
Pickup at Shelf

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

- Requests Operator

To convert a request to be a resource sharing borrowing request, you must have the following role:

- Fulfillment Services Manager (Note that Ex Libris can also enable this for the Fulfillment Services Operator and/or Requests Operator roles)

Physical items are picked up from a shelf in the stacks (the general shelves of the library). If requested by a patron, the item is transferred to the hold shelf (see Managing the Hold Shelf).

When a hold request is created and the holdings to fulfill the request is not available in the selected pickup location library, Alma matches the holdings to the request using additional parameters as follows:

1. Alma attempts to locate a holdings belonging to another library on the same campus as the pickup location.
2. If no holdings is found on the same campus, more than one holdings exists in different locations on the campus or if no campuses have been defined, Alma checks the Transit Time Rules to find a copy that is closest to the required pickup location. If a rule exists for a holdings and the Use for Hold Request Pickup Calculation check box is selected, Alma uses the configured transit time to find the available copy that is closest to the required pickup location. See Adding a Transit Time Rule.
3. If more than one holdings has a transit time rule, then the holding with the shortest transit time is selected.

This section describes the task options that are available to the Requests Operator when picking up an item from the stacks.

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

The following information appears in the pickup list for an item:

- ISBN or ISSN
- Edition
- Description
- Imprint – The place of publication, publisher, and date of publication
- Author

Note

If there are items to be picked up from a shelf in the stacks, a 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 appear depend on the characteristics of the requests. The available facets include:

- **Request Date** – Date on which the request was made
- **Request/Process Type** – The request type
- **Location** – The location where the request items are shelved
- **Call Number** – Call number of the item
- **Pickup Institution** – Institution where the patron will pick up the item or to which the item will be moved
- **Destination** – Location where the patron will pick up the item or to which the item will be moved
- **Material Type** – Requested material type
- **Request Printed** – Requests for which a slip has been printed
- **Request Reported** – Requests which are included in a Slip Report (that is, **Print Slip Report** 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** appears 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. If you selected several items, aggregates all the slips into a single PDF to be printed together. In a notification that appears, select Quick Printing if you would like to open the printing window immediately when the letter is generated, overriding the Print dialog. From there you can send the created PDF to a designated printer or save it to a file.
Then the item's barcode is scanned (see Scanning Items), and the call slip is placed with the item. You can also select Print slip from the Print slip drop-down list and select Execute. The print slip option uses the Ful Resource Request Slip letter. For more information, see Configuring Alma Letters.

- 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 selecting 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. The email letter is Ful Pickup Print Slip Report letter. This link opens the following dialog box, which allows you to specify the format type of the report and the report's destination:

![Print Slip Report Dialog Box](image)

Print Slip Report Dialog Box

---

**Note**

For title requests submitted using Alma/Primo, barcodes from all titles—both preferred and non-preferred—are included in the print slip report.

---

Choose one of the following destination types in the **Type** field and select **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. For more information on customizing the Print Slip Report Letter, see Configuring Alma Letters.

- If you prefer to view the report on the screen, select **Download** instead of **Send**.
- **Edit** – Opens the Create Request page, where you can edit the request (see Creating a Request).
- **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 the of the cancellation to patrons. Select **Confirm**.

The notification letter that is sent is the Ful Cancel Request Letter. To configure the notification, see Configuring Alma Letters.

- **Update Expiry** – Changes the expiry date for the request. Select the expiration date box, select a new date and select **Save**.

If an expiration date passes and an item is not picked up from the shelf, it is marked as missing. The Requests - Handle Expiration Step job 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 missing**.
Item in place on the List of Items page (see Working with the List of Items).

- **Skip Location** – The request will be deactivated from the current location and attempted to be fulfilled by another location.

- **Manual Skip Location** - If the Skip Location action is available (the request can be fulfilled by at least one other location that the request has not been previously assigned to), a Manual Skip Location action now displays in addition to the Skip Location action. The manual action suggests a list of alternative locations by which the request may be fulfilled, sorted in the following order:
  - Holdings in remote storage with the Prefer Over Other Locations check box selected (see Adding a Remote Storage Facility).
  - Holdings whose owning library matches the requested pickup library.
  - Holdings on the same campus.
  - All other holdings that can fulfill the request but are not at this campus or if no campuses have been defined, the locations will be sorted by their transit time to the pickup location, if a transit time rule between the pickup location library and the location holding library has been defined and if the rule supports Hold Request Pickup Calculation.
  - Holdings in remote storage that do not have the Prefer Over Other Locations check box selected.
  - Holdings that were previously assigned and changed by the Skip Location action.

- The same logic will be automatically applied if the Skip Location action is used, automatically selecting the first location as per the sorting method described above.

- **Mark as Missing** – This action marks all items under the holding as missing.

- **Convert to Resource Sharing** – Convert the request to a resource sharing borrowing request. If there are multiple requests aggregated into a single request, all of these requests are converted with this action.

  This action will succeed if:
  - The request is a Hold or General Hold request (request for holding without item)
  - The workflow step is Not Activated, Pickup-From Shelf, or Waiting for Remote Storage.
  - The user has the Fulfillment Services Manager role (Ex Libris can also enable this for the Fulfillment Services Operator and/or Requests Operator roles).
  - The request's Date Needed By has not passed.
  - The requested pickup location is supported for resource sharing requests.

- **View Title in Search** - Opens a repository search for the item.

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

Items can be sorted by call number or location name. The Sort by drop-down box shows the options for sorting by call number and location name in either ascending or descending sequences.

If one or more request notes exist, they are displayed aggregated together with a "|" (pipe symbol) in between each request. Only notes for active requests that are being picked by the current circulation desk are displayed. The notes of the active request are presented in the Pick Up Requested Resources page in no specific order. If you click the link for the request queue, all requests are displayed along with a new column that displays the request notes.
Watch the Request Notes in Pick from Shelf List video (0:48 minutes).
Scanning Items

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 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 appears in the following ways:

- Analytics reports
- On the History tab of the Physical Item Editor page, select Fulfillment activities (see Physical Item Editor Page - History Tab table)
- In the item’s Info pop-up window (from the search results of a repository search)

**Note**

For detailed information on in-house loans, see Loan - Report Creation Tips.

The fields on the Scan In Items page vary depending on the configuration parameters that are set.

Receiving resource sharing items at a desk other than a resource sharing desk may affect the due date and renewals. It is recommended that all receiving and shipping for resource sharing items be done only from the Receiving and Shipping interfaces.

The Scan In interface has an option to turn on a pop-up window that informs the user that the item is a resource sharing item and that the receiving or shipping interfaces should be used. If a scanned item requires shipping or receiving for resource sharing borrowing or lending request, an error message is displayed that may be overridden. The block option is controlled by a customer parameter, rs_allow_actions_on_scan_in.

When the parameter is set to false, an error message with an override option will be displayed when a borrowing or lending request is scanned at a desk of a resource sharing library which is the owner of the request. When the library is not the owner of the lending request, the parameter is not checked and transit is triggered regardless of the operator’s scope. For a borrowing request, the message is, “Receiving is required to be done from the dedicated screen.” For a lending request, the message is, “Shipping is required to be done from the dedicated screen.” The message can be overridden and the operation will take place in the scan-in interface. If the block is overridden, the following actions take place:

- The borrowing request status is updated to ‘Received by Library’.
- The Receive ISO message is sent.
- The temporary item is updated as if the receive screen was used without the due date.
- Fees are calculated.

When the parameter is set to true, the error messages are not displayed and the process continues directly.

When accessing the Scan In interface from a resource sharing library, there are two links for the shipping and receiving interfaces.

**To scan an item:**
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 selecting the Browse icon to search for a barcode. The fields on this page are described in the following table.

### Scan In Items Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Place directly on hold shelf</td>
<td>Select from the following:</td>
</tr>
<tr>
<td></td>
<td>• Yes – The item is 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). The Ful Hold Shelf Request Slip Letter prints to the circulation desk printer to indicate that the requested item was placed on the hold shelf, regardless of whether a pick slip was already printed.</td>
</tr>
<tr>
<td></td>
<td>• No – The item not yet ready for the hold shelf and is 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).</td>
</tr>
<tr>
<td>This field appears only when the Has hold shelf processing option is selected when configuring a circulation desk (see Configuring Circulation Desks). Items designated for Hold Shelf Processing are nevertheless displayed as On Hold Shelf on the List of Items (see Managing Requests and Work Orders). 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.</td>
<td></td>
</tr>
<tr>
<td>Automatically print slip</td>
<td>The method for printing the slip:</td>
</tr>
<tr>
<td></td>
<td>• No – Manual selection is required.</td>
</tr>
<tr>
<td></td>
<td>• Yes – If multiple requests match the scanned item, one is activated automatically.</td>
</tr>
<tr>
<td></td>
<td>This controls the printing of the resource request slip, not the transit slip. If the wanded in item has more than one request, then setting this attribute to Yes will cause Alma to automatically select the request that will be fulfilled by the item, as per the requests’ priority and the time it was submitted. If this attribute is set to No, then the system will respond with the message, More than one request found for entered item, please enter request ID. Alma remembers the last selection made for this field during this session.</td>
</tr>
<tr>
<td>Register in-house use</td>
<td>Whether to register a new in-house use indication when scanning an item. When the box is selected, the Number of In-House Uses value in the More Info pop-up window updates after scanning an item. (The More Info pop-up window appears when selecting More Info on the Repository Search page.)</td>
</tr>
<tr>
<td></td>
<td>If there is a pending request for an item, no in-house use is registered when this check box is selected.</td>
</tr>
<tr>
<td></td>
<td>Clear the check box to ensure that scanning an item does not create a new in-house use indication. When this box is cleared, the Number of In-House Uses value in the More Info pop-up window remains the same after scanning an item.</td>
</tr>
<tr>
<td></td>
<td>This field appears only when the Set status to field does not appear on the page.</td>
</tr>
<tr>
<td>Work order type</td>
<td>Work order type for the item being scanned. This field appears 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).</td>
</tr>
<tr>
<td>External identifier</td>
<td>Whether an external identifier may be used instead of the item barcode (Select No or Yes). Displayed only when working at a Resource Sharing library.</td>
</tr>
<tr>
<td>Set status to</td>
<td>The material status (from a list predefined by an administrator).</td>
</tr>
<tr>
<td></td>
<td>Note the following:</td>
</tr>
<tr>
<td></td>
<td>• This field appears only when the current desk/department is set to a work order department or a circulation desk defined as a work order department, and does not display when the Register in-house use field appears.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
|                        | • If this field does not appear, statuses are set automatically.  
|                        | • Values appear in this field only when statuses are configured as work order type statuses on the General Configuration menu. To add statuses, contact your administrator.                                            |
| Done                  | 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 appears 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     | 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 select the **Browse** icon, the Repository Search page opens. Perform a search in the repository, select the item you want, and select **Select**. |
| (Required)            |                                                                                                                                                                                                             |
|                        | **Note**  
Receiving multiple items using the scanning interface is not currently supported when shared barcodes are used.                                                                                         |
| 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 selecting this, the Choose Holding Type pop-up window opens. Select the holding type and, where relevant, the citation type, and select **Choose**. The Quick Cataloging page opens, where you configure resource and item information and select **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 Physical Inventory - Defining and managing work orders in Alma. |
| 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 select **OK**. |
|                        | 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 appear 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.
A description of the Scanned In Items columns is provided in the following table.

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>The title of the identified resource.</td>
</tr>
</tbody>
</table>
| Destination        | The library or location to which the item is to be sent. Possible values are:  
  - <Library Name>  
  - Reshelve To <location name>  
  - Manage Locally - <work order type> – Indicates that the item has been scanned in at a Work Order department, and has to be processed there as well as the type of work order.  
  - Digitize – For resource sharing and digitization requests  
  - Document Delivery – For resource sharing and digitization requests  
  - Deposit – For resource sharing and digitization requests  
  - <Partner Name and Request Number> – For resource sharing requests |
| Barcode            | The barcode of the identified resource.                                                                                                       |
| Request Type       | The reason that the item is being sent.                                                                                                       |
| Requester          | The name of the requester.                                                                                                                     |
| Requester ID       | The preferred user identifier, as defined in User Management Configuration (see Configuring Other Settings). This column displays a value only for patron-driven requests.  
If a value was not configured for this field for a patron-driven request, the user name is displayed. |
| Place in Queue     | A number which is a link to the queue of requests for the scanned-in item.                                                                      |
| Checked In         | The slider indicates if the scanned item has a loan attached to it.                                                                            |

**Note**

- To remove all the items in the table, select **Clear List**.
A yellow icon is added to the list of scanned items for patron request of types Booking Requests, Physical Requests, and Patron Digitization Requests to draw the scanning operator's attention that some items have a patron request associated with them.

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).
- **Patron physical item request** – The item is sent to the active hold shelf at a circulation desk (see Managing the Hold Shelf). 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).
- **Restore** – The item is restored from its temporary location to its permanent location.

1. Select an option from the row actions list:
   - **Print slip** – Print a call slip for the item that can subsequently be attached to the item by the Requests Operator.
   - **Work order** – Create a request (see Creating a Request from the Institution).
   - **Cancel request** – Open the Confirm Request Cancelation page, where you select a reason for cancelation from the Cancelation reason drop-down box and select Confirm.

2. Select **Exit** to return to the Alma home page, or select **Go To Manage Department Items** to open the Items in Department page (see Managing Receiving Department Tasks).
   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**

When moving an item, you can edit any of the information available for the item.

**To change item information:**

1. On the Scan In Items page (**Fulfillment > Resource Requests > Scan In Items**), select the **Change Item Information** tab.
2. Change the information as needed. The fields on this page are described in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Place directly on hold shelf</td>
<td>Select from the following:</td>
</tr>
<tr>
<td></td>
<td>▪ <strong>Yes</strong> – 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).</td>
</tr>
<tr>
<td></td>
<td>▪ <strong>No</strong> – 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</td>
</tr>
</tbody>
</table>

---
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>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). This field appears only when the Has hold shelf processing option is selected when configuring a circulation desk (see Configuring Circulation Desks). Items designated for Hold Shelf Processing are nevertheless displayed as On Hold Shelf on the List of Items (see Managing Requests and Work Orders). 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.</td>
<td></td>
</tr>
<tr>
<td>Change type</td>
<td>Select a different type of request (from a list predefined by an administrator). You can select from: ◦ Temporary ◦ Permanent ◦ Restore (from temporary location to permanent location)</td>
</tr>
</tbody>
</table>
| Location                     | Select another library location (from a list predefined by an administrator) in which you want to place the item.  

**Note**  
Item location can be changed for items on loan.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 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                 | Select **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).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| New Barcode                  | Enter a new barcode for the item.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Scan item barcode (Required) | Enter a different item barcode. When you enter part of the barcode and select **Browse**, the system suggests items that satisfy your entry. Select the item you want, and select **OK**.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Check requests               | Select to indicate that changes made to the Location and Item policy fields generate a confirmation message during the current session. When the check box is selected and an item has requests, a confirmation message appears when these fields are modified. When the check box is not selected, no confirmation message appears when these fields are modified.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Update RFID                  | This check box is displayed when RFID is enabled and active. Select this check box to write the information on this page to the RFID chip on the item. The items that will be updated are Location, Call Number, Item Policy and Barcode.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>If the RFID update is unsuccessful, a pop-up will be displayed to try again. The setting on this check box will be remembered for the next use. For more information, see RFID Support.</td>
<td></td>
</tr>
<tr>
<td>Due back</td>
<td>Select 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.</td>
</tr>
<tr>
<td>Item policy</td>
<td>Select another type of library policy that the item uses (from a list predefined by an administrator). Select None to remove the value previously selected.</td>
</tr>
<tr>
<td>Call number</td>
<td>Enter another library classification number that identifies the item.</td>
</tr>
</tbody>
</table>

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

For a description of the Destination column values, see the Destination entry in Scanned In Items Columns.

To create a print slip for the item that can subsequently be attached to the item by the Requests Operator, select Print slip from the row actions list.

To create a request for the item, select Work order from the row actions list (see Creating a Request).

---

**Note**

When an item undergoes a change by Change item information and a new holdings record is created, the old holdings record will be deleted if no other items are attached to it.

When changing an item's permanent location, the change is processed in the following manner:

- If the call number field is empty
  - When there are no other item in this holdings, a new holdings is created that replaces the old one, and the new...
holdings copies the original holdings (with no change).

- When there are other items under this holdings, a new holdings is created in addition to the old one, and the new holdings copies the original holdings (with no change).

- If the call number field is not empty
  - When a new call number does not match any holdings and:
    - when there is no other item in this holdings, a new holdings is created that replaces the old one, and the new holdings generates the location (852) from the new call number (either normalized or raw).
    - when there are other items under this holdings, a new holdings is created in addition to the old one, and the new holdings generates the location (852) from the new call number (either normalized or raw).

- When a new call number matches an existing holdings and:
  - when there is no other item in this holdings, the item is moved to the matched holdings. The original item’s holdings is deleted and no new holdings is created.
  - when there are other items under this holdings, the item is moved to the matched holdings. The original item’s holdings stays the same. No new holdings is created.

---

**Note**

If you want to force the creation of a new holdings with the previous call number, specify the call number in the Change Item Information tab. If you do so, a new holdings is created, preserving the previous call number.
Moving Items

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.

See Relinking Items to Another Bibliographic Record for related information.

To move an item:

1. Create a request to move an item permanently or temporarily (see Creating a Request).
2. Follow the typical Resource Requests Workflow:
   1. Locate the item (see Managing Requests and Work Orders)
   2. Take the item from its location (see Pickup at Shelf)
   3. Scan the barcode (see Scanning Items)
   4. Move the item to its new location, and scan its barcode again (see Scanning Items)

If additional information about the moved item (such as its location) must be changed, select the Change Item Information tab (see Changing Item Information).
Managing the Hold Shelf

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

- Requests Operator

After a physical item that was requested by a patron is picked up from a shelf in the stacks (see Pickup at 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) so the Circulation Desk Operator can manage it (see Managing Active Hold Shelf Items), and an email is sent to the requested patron indicating the date until which the item is to remain on the hold shelf.

Items are retained on the hold shelf until the date specified in Held Until. The date is determined by the Hold Shelf Period policy from the request terms of use (see Adding Fulfillment Policies) and the Maximum time on hold shelf definition from the circulation desk (see Adding a Circulation Desk). The earlier value of the two is used. Only the library's open days are counted in determining the date.

While the item is on the hold shelf, the Requests Operator can request to update the request expiration date or cancel the request (see Managing Active Hold Shelf Items).

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

1. The item's request expires (see Managing Expired Hold Shelf Items) and the item is returned to its permanent location.
2. Notification is sent to the requesting patron.

Scanning Items at the Hold Shelf

For instructions on scanning in items, see Scanning Items.

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 Email

Emails can be customized on the General Configuration page by the General System Administrator (see Configuring Alma Letters).
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. As long as the item has not been removed from the hold shelf, it will continue to appear in the active hold shelf list, even if it is expired. The active list is intended to reflect items that are physically on the shelf, regardless of whether they are expired or should be removed.

Note

The Active Hold Shelf option appears only when you are at a circulation desk; see Library/Desk Selector in The Persistent Menu.

For a circulation desk that is not a reading room, the Active Hold Shelf Items page (Fulfillment > Resource Requests > Active Hold Shelf Items) contains one tab that displays the following options for each active hold shelf item that is waiting to be picked up by a patron:

- **Place in Queue** – Indicates the place of the item in the requests queue. Select the number to open the Request Queue page (see Viewing and Handling Processes and Requests).
- **Cancel request** – See To cancel a request:. When canceling requests on the hold shelf, they are marked as expired and displayed on the Expired Hold Shelf (see Managing Expired Hold Shelf Items). When canceling a resource sharing borrowing request on the hold shelf, the request also appears in the Resource Sharing Borrowing Requests list if the item is in a process (see Managing Resource Sharing Borrowing Requests).
- **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. If the request is not connected to an item, all items under this holding will be marked as missing.

After performing one of the above actions, select Back to return to the Active Hold Shelf Items page.

If the circulation desk is defined as a reading room, three tabs appear:

- **Waiting for Pickup** – Active hold shelf items that are waiting to be picked up by a patron, as described above.
- **Held by Patron** – 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** – The Print Slip button and links on this tab are not for use.
  - **Receive from Patron** – Select multiple items on the list to be returned to the hold shelf in bulk.
- **On Shelf (Not Final)** – 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** – The Print Slip button and links on this tab are not for use.
  - **Loan to Patron** – Select multiple items on the list to be loaned to the patron in bulk from the hold shelf.

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.

The default option that is displayed is the option you selected for hold shelf sorting at the circulation desk, in the Hold shelf sorting field on the Circulation Desk – General Information page (see the Has hold shelf description in Circulation Desk –
To cancel a request:

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

![Confirm Request Cancellation](image)

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

   To customize cancellation reasons, contact Ex Libris Support.

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. The email letter that is sent is the Ful Cancel Request Letter. To configure the email, see Configuring Alma Letters.

---

**Note**

If the date by which the request is needed has passed, a letter is no longer sent.

---

5. Select **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.

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.

---

**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. The item will appear on both the Active and Expired Hold Shelf pages until it is rejected, at which point the item will be removed from the Active Hold Shelf page. If the item 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 criteria for sorting the results in the Sort by field.

The default option that is displayed in the Sort by field is the option you selected for hold shelf sorting at the circulation desk, in the Hold shelf sorting field on the Circulation Desk – General Information page (see the Has hold shelf description in Circulation Desk – General Information Fields table in Adding a Circulation Desk).

Note

The Expired Hold Shelf option appears only when you are at a circulation desk; see Library/Desk Selector in The Persistent Menu.

When the circulation desk is also a reading room, the Items drop-down list displays, where you select the type of items you want to view: 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.

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

   To send an item to another circulation desk, select the Transit link beneath the item or, to send multiple items, select the check boxes of the relevant items and select Transit. The Ful Transit Slip letter 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.

To send an item to another library, select the **Transit** link beneath the item or, to send multiple items, select the check boxes of the relevant items and select **Transit**. The Ful Transit Slip letter 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.

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

- **Send to Institution** - Lists all requests for items belonging to a different institution or that are requested for pickup at another institution.

To send an item to another institution, select the **Transit** link beneath the item or, to send multiple items, select the check boxes of the relevant items and select **Transit**. The Ful Transit Slip letter is printed and the item is put in transit.

To edit an item in any tab, select 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 **Request Attributes table in Creating a Request**. This link is hidden for reading rooms.

To update the request expiration date for an item in any tab, select the **Update expiry** link beneath the request and modify the expiration date in the Update Expiration Date dialog box. This link is hidden for reading rooms.

Resource sharing borrowing requests with multiple items will list each item separately. In contrast, the Primo My Account request list shows only one line item per request. This is because Primo displays only the resource sharing request, regardless of how many items shipped to fulfill the request, while Alma displays all the items to the operator that are on shelf or in transit. For more information, see [Resource Sharing Requests with Multiple Items](#).
Digitization Processing

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 or electronic item (see Creating a Request).

Physical items are transferred from their library location to the digitization department (see Configuring Digitization Departments), where they are scanned and digital files are created. Electronic items are digitized by locating them in the repository and saving them in digital format.

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. Access to the file is controlled by access rights.

• Patron – The patron receives the digital file, or a link to the digital file, in an email.

You can request digitization for the entire item or for a chapter, page range, or article within an item.

Digitization Department Workflow for a Physical Item

The following is an illustration of a typical digitization department workflow, after the item was requested for digitization. It starts with the arrival of the item to the digitization department, through the creation of its digital file, to delivery of the digital file.
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). The item acquires the status **Digitization**. For information on requests to digitize physical items, see Creating a Request.

   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 (see Configuring Digitization and Copyright Rules). These include:

   ◦ Copyright clearance – If required, the library receives a copyright license (for example, from the 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.

---

**Note**

   ◦ 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.
   ◦ Notification to the requester is withheld until the request is approved.

---

2. The item is digitized (see Digitizing Items).

3. The request proceeds to the delivery stage (see Delivery of Digitized Items). Delivery is handled in one of the following ways:
1. By the Add Digital Representation functionality (see Adding a Representation). The digital file can be searched in the Primo application.

2. By the Document Delivery – Attachment – An email is sent to the requesting patron with the digital file as an attachment (see Attaching Digitized Items to Be Sent to a Patron).

3. By the Document Delivery – Link – An email is sent to the requesting patron with a link to download the digital file (see Attaching Digitized Items to Be Sent to a Patron).

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Note

The delivery method is defined by preset rules (see Configuring Digitization and Copyright Rules).

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For more information, see Digitization Requests Flow.

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Approving/Rejecting a Request for Digitization

To approve digitization requests, you must have the following role:

- Fulfillment Services Manager

You must approve or reject digitization requests when digitization and copyright rules determine that approval is required (see Configuring Digitization and Copyright Rules) or when a copyright approval task is specifically requested, such as for a citation (see Adding Citations to a Reading List).

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

You approve or reject digitization requests on the Approval Requests List page (Fulfillment > Resource Requests > Approval Requests List). You can also view this page by selecting the task Requests - Digitization - need approval in the Tasks List in the persistent menu (see Tasks in the Tasks List) or after selecting Save and Manage Approval on the Edit Reading List Citation page (see Managing Citations).

---

Approval Requests List

You can perform the following actions on this page:

- **Filter the requests** - In addition to the Status and Associated With Course filters, you can select Filter by this Record from the row actions list in a request row to view only requests for that record, including all other requests for the same MMS ID, ISBN (ISBN/10 or ISBN/13 are both returned), or ISSN/Volume/Issue. In the latter case, items with no issue but the same ISSN and volume, or no volume and no issue but the same ISSN, are returned also.

  When entering this page after selecting Save and Manage Approval on the Edit Reading List Citation page, Filter by this Record is selected by default.

- **Update the request's expiration date** - Select Update Expiry from the row actions list to open the Update Expiration...
Date dialog box. Change the request expiration date and select **Save**. This action is possible only if the request already has an expiration date.

- **Approve or reject the request** - See below.
- **View relevant digitization and copyright rule** - To view the digitization and copyright rule that resulted in this request requiring manual approval (instead of being automatically approved or rejected), select **View Rule** from the row actions list. A read-only version of the Digitization Workflow Setup page appears, containing information about the rule that triggered manual approval for this request.

![Digitization Workflow Setup Page (Read-Only)](image)

**To approve/reject a request for digitization:**

1. On the Approval Requests List page, select **View** or **Work on** from the row actions list of the item you want to approve. The Approval Requests List page appears, displaying details of the item.

![Approval Requests List Page - Work On](image)

2. If you selected **Work On**, you can modify the necessary fields, as described in the following table:

<table>
<thead>
<tr>
<th>Section</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digitization request</td>
<td>CC number</td>
<td>The Copyright Clearance Center number. The number indicates that the library has a license to use copyright-protected content.</td>
</tr>
</tbody>
</table>
Note that if you select **Cancel** after adding an attachment, the attachment remains and can be worked on later. After the attachment is uploaded, you can select **Actions** in the row of an attachment to:

- **Edit** – Edit the attachment, including uploading a different file
- **Delete** – Delete the attachment
- **Download** – Download the file

• Approve or reject the digitization request:

  - Select **Approve** to approve the digitization request. On the Approve the Request page, select a reason from the **Reason** drop-down list, enter any notes in the **Notes** field, and select **Submit**. The list of reasons are:
    - Automatic
    - Covered by License
    - Creative Commons
    - Direct Permission Obtained
    - Legal Exception
    - Open Access
    - Other
    - Out of Print
    - Preprint
    - Primary License
    - Self-Declared
  
  - Select **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 select **Submit**. The approver’s decisions are saved for the digital file. The list of reasons are:
    - Other
    - Rejected by Manager
    - Rejected by CCC

**Note**

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

The list of approval and rejection reasons cannot currently be modified.
Digitizing Items

To start the digitization process, ensure that you are at the digitization department that currently holds the item; see Library/Desk Selector in The Persistent Menu.

Digitization is configured on the In Process Items page (Fulfillment > Resource Requests > Manage In Process Items). You can also view this page by selecting one of the following tasks the Tasks List in the persistent menu (see Tasks in the Tasks List):

- Items - deposit
- Items - digitization
- Items - document delivery

The In Process Items page displays patron and/or staff digitization requests. The type of request appears in the Status column.

To digitize physical items:

1. From the In Process Items page, locate an item with the Digitization status.

   An item has this status after a) it has a digitization request attached to it and b) it is then scanned in at the digitization department.

2. Select Next Step from the row actions for the item. The status changes to Digital Inventory or Document Delivery depending on the digitization configuration (see Configuring Digitization and Copyright Rules).

   Next Step appears only when the current status is Digitization.

   For details on delivery of digitized items, see Delivery of Digitized Items.
Delivering Digitized Items

After digitizing items (see Digitizing Items), you send the digital file to the requester or add it to the inventory of the institution. Before performing digitization delivery, ensure that you are at a digitization department; see Library/Desk Selector in The Persistent Menu.

Delivery of digitized items is configured on the In Process Items page (Fulfillment > Resource Requests > Manage In Process Items).

Note

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

To deliver digitized items:

For items with a status of Digital Inventory, select Add digital inventory from the row actions list to open the Representation Details page (see Adding a Representation).

Items with a Document Delivery status may be sent as email attachments or as links, depending on how the Digitization and Copyright Rules have been configured:

- For items waiting for an attachment-based document delivery, select Attach documents from the row actions list to open the Attachments page and attach digitized items to be sent as attachments to the requesting patron (see Attaching Digitized Items To Be Sent To a Patron).

- For items waiting for a link-based document delivery, select Upload documents from the row actions list to upload digitized items to be sent as links to the requesting patron (see Attaching Digitized Items To Be Sent To a Patron).


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

- Edit – The In Process Items: Request Management page appears.
° Optionally, in the **Status** field, select a status from the drop-down list. You can also view or add a note.
° To add a note, select **Add Note** and type your note. The note is displayed in the list of notes on the page.
° To edit a note, select **Edit** from the row actions list for the note that you want to update, modify the note on the **Edit Note** page, and select **Save**.
° To delete a note, select **Delete** from the row actions list for the note that you want to delete and select **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.

**• Cancel request** — The Confirm Request Cancellation page appears.

![Confirm Request Cancellation Page](image)

**Confirm Request Cancellation Page**

1. In the **Cancellation reason** field, select a reason for cancellation from the drop-down list. To customize cancellation reasons, contact Ex Libris Support.
2. In the **Cancellation note** field, add a note on the cancellation as needed.
3. Select **Confirm**.

**• Change to Electronic Digitization** — Change 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** — Change 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 (Alma Link Resolver) page appears, displaying resources for the item. This option appears only if the item is configured for electronic digitization.

### Attaching Digitized Items to Be Sent to a Patron

Attach documents to be sent to the requesting patron on the Attachments page. The Attachments page is visible when you select **Attach Documents** from the row actions for an item on the In Process Items page.

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

**•** To edit an attachment, select **Edit** from the row actions list for the attachment that you want to update, modify the **File name**, **URL**, and **Notes** fields as required, and select **Save Attachment**.

**•** To delete an attachment, select **Delete** from the row actions list for the attachment that you want to delete and select **Confirm** in the Confirmation Message pop-up window.
• To download a file, select Download from the row actions list for the file that you want to download, specify the folder to which you want to save the file, and select OK.

Note

If the digitization request required approval then the notification emails described below are sent only once request has been approved.

• If the delivery method is Attach Documents - Attachment, the patron receives the digital file as an email attachment. An example of the Ful Digitization Notification Item letter follows.

Notification Item Letter for Digital File

• If the delivery method is Attach Documents - Link, the patron receives a link to download the file in an email. Using this method will decrease the size of the email, and easily enable managing more digital resources in a single request. An example of the Document Delivery Notification Letter follows.

Notification Letter - Document Link

The library administrator must configure the email to include only the relevant login option for your institution (local/ LDAP, SAML or CAS).

When selecting in the relevant select here link, the patron will first be required to log in using the standard Alma/Primo credentials. After a successful login, the patron will gain access to the digitized files that are stored in the document storage folder. Note that access will be limited to the number of times configured in the digitization and copyright rule, and the files will be automatically removed from the storage after the configured number of days. This value is defined in the document_delivery_cleanup_days parameter. See Configuring Other Settings.

• If the delivery method is Digital Inventory (representation), 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.

For both link digitization requests and attachment digitization requests, the file size limit is 25 MB. A message appears if the limit of the total digital file size has been reached. Additional email related constraints may be relevant if the digitized material is sent as an email attachment.
Recall Requests

When an item on loan to a patron is then requested by a second patron, a recall request may be created for the original loan. The recall process is initiated if the Loan Recalls Configuration (Configuration Menu > Fulfillment > Physical Fulfillment > Loan Recalls Configuration) is set to activate a recall for the submitted request type. The following policies are then examined on the loan's Loan TOU to determine which actions will be taken:

- **Is Recallable** - If this policy is set to true, the original loan status changes to Recalled and the due date on the original loan changes. If Is Recallable is set to false, the loan status changes to Recalled but the due date does not change. See Is Recallable.

- **Recall Period** - The recall period policy determines how the due date will change. If the due date is already due back before the number of days in the policy, the due date will not be changed. See Recall Period.

- **Recalled Overdue Fine** - A different overdue fine may be applied to a recalled loan. This policy determines the fine, if any. The fine is independent of the due date change and may be applied even if Is Recallable is set to false. See Recalled Overdue Fine.

- **Requested Item Due Date** - You may specify a shortened due date when loaning an item that already has additional requests in the queue. See Requested Item Due Date.

- **Cancelled Recall Due Date** - For an item that is loaned and then recalled, if the recall is canceled, this policy determines what happens to the due date of the original loan. See Cancelled Recall Due Date.

When a recall request is issued on an item with multiple copies that are loaned, one loan will have its due date changed. The others may continue to renew their loans. However, if the Not Renewable – Item Has Request(s) block policy is set to block, the other loans for the same item will be blocked from renewing their loans. See Configuring Block Preferences.

When a recall is issued, a Loan Status Notice Letter is sent to the patron. The letter can be disabled. See Configuring Library Notices Opt-In. The letter may also be disabled for a set of users in the Update/Notify Users job. See Selected Patron Letters. Recall letters are most commonly disabled when your institution does not change due dates for patrons with recalled loans. For more information about the letter, see Configuring Alma Letters.
Resource Sharing

This section includes:

- **Resource Sharing Workflow**
  - Broker Based Resource Sharing - Borrowing
  - Broker Based Resource Sharing - Lending
  - Peer to Peer Resource Sharing - Borrowing
  - Peer to Peer Resource Sharing - Lending
  - RapidILL Based Resource Sharing Workflow
- **Managing Resource Sharing Borrowing Requests**
  - Configuring Rota Templates
  - Creating a Borrowing Request
  - Editing a Borrowing Request
  - Sending a Borrowing Request
  - Borrowing Requests Associated with Funds
  - Managing Borrowing Renewals
- **Managing Resource Sharing Lending Requests**
  - Creating a Lending Request
- **Locating Items for Resource Sharing**
- **Receiving and Shipping Resource Sharing Items**
- **Configuring Alma/Broker Integration**
Resource Sharing Workflow

Resource sharing enables a request by a patron in one institution fulfilled by another institution. The fulfillment of the request is invisible to the patron: the patron requests and returns the item to the patron's local institution, except in some cases with a fulfillment network. Resource sharing has two main players: borrowing library and lending library (see the following entries). The lending library usually sets the due date and overdue fees of the material borrowed. The borrowing library and the lending library communicate in order to enable the requesting patron to receive material, and return it to the owning library after it was used.

Different libraries within an institution or from different institutions can share resources. Sharing can be done either through Peer-to-Peer, Broker-based, or Fulfillment Network requests. Each type of sharing has slightly different rules and follows different workflows.

For more information on resource sharing, see the Introduction to Resource Sharing video series (3 sessions). It is also recommended that you watch the detailed Ask the Expert sessions on resource sharing.

Peer-to-Peer Resource Sharing

Peer-to-peer resource sharing occurs when a patron places a title level request at their home institution. Alma can be configured for the borrowing institution to find the resource automatically at lending institutions and place a request. The lending institution supplies the item based on negotiated lending policies. The borrowing institution then performs the circulation.

Resource sharing libraries can manage both borrowing and lending. The protocols currently used for peer-to-peer sharing are ISO or NCIP.

For more information on the peer-to-peer resource sharing workflow, see Peer to Peer Resource Sharing - Borrowing and Peer to Peer Resource Sharing - Lending.

For more information on the ISO and NCIP protocols, see the Developer Network.

For details on managing borrowing requests, see Managing Resource Sharing Borrowing Requests.

Watch the Peer-to-Peer Resource Sharing video series (5 sessions).

Broker-based Resource Sharing

In broker-based resource sharing, the borrowing institution staff requests a resource at the title level from a broker on behalf of the patron. The broker then chooses a lending institution, which defines the lending policies. Circulation is performed in the broker system.

For more information on broker-based resource sharing, see Broker Based Resource Sharing - Borrowing and Broker Based Resource Sharing - Lending.

For details on managing lending requests, see Managing Resource Sharing Lending Requests.

For additional details on the broker-based protocols of NCIP, Libris, and SLNP as well as their integration with resource sharing requests, see the Developer Network.

For details on configuration settings to enable integration with the broker, see Configuring Alma/Broker Integration.

Watch the Broker-Based Resource Sharing video series (5 sessions).
Fulfillment Networks

A fulfillment network is a group of Alma institutions that have a predefined agreement to provide fulfillment services to the patrons of the other institutions in the network. Patrons can search the network members’ collections and directly request resources from the institutions within the group. The requested items can be circulated at any institution in the network.

For more information on Fulfillment Networks, see Fulfillment Networks and Configuring Fulfillment Networks.
Broker Based Resource Sharing - Borrowing

The broker borrowing workflow describes the entire borrowing workflow including steps that take place entirely in the broker system. Those steps that take place in the broker system are indicated in the blue-shaded boxes.

For additional details on the broker-based protocols of NCIP, Libris, and SLNP as well as their integration with resource sharing requests, see the Developer Network.

For details on the configuration settings that must be invoked in Alma to enable integration with the broker, see Configuring Alma/Broker Integration.

Borrowing Request Creation

This section refers to steps 1-4 of the broker borrowing workflow diagram.

This section describes a sample workflow for submitting resource sharing requests using a broker.

The requesting patron submits a resource sharing request to a broker in one of the following ways:
• Using Primo, PC, or any OpenURL enabled system, such as Google Scholar (with complete metadata) or using the citation linker (with incomplete metadata). The request is then sent to and accepted by the broker. Selecting a broker link transfers the patron out of Primo and directly to the broker system.

• Using the broker’s system directly, log in to perform a search and submit a request.

On initial request submission, the broker updates the request status to **Document Received**. Most broker systems do not notify Alma about the request at this point, but rather at the time of receiving items. Following the request submission, the broker system handles the rota management and sending the request to the lending institution.

---

### Receiving Items

*This section refers to step 5 of the broker borrowing workflow diagram.*

The actual receiving process is carried out in the broker system. The broker system then sends an **AcceptItem** message to Alma.

- For a physical request, the broker confirms that a brief bibliographic and item record is created in Alma, and a resource sharing borrowing request and internal hold request are created for the patron.
- For a digital request, the request is created with a digital format. Based on the broker configuration for the automatic receive parameter, it may be marked as completed when the request is created.

For more information about digital document delivery of resource sharing requests, see the [More Information About Digital Fulfillment of Resource Sharing Requests](#) video (18:43 mins).

Actions are taken on the received messages. Please refer to the Developer Network for a detailed description of how Alma identifies these messages as related to requests for digital supply:

- [NCIP](#)
- [SLNP](#)

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### Manage Loan

*This section refers to step 6 of the broker borrowing workflow diagram.*

Once a requested item has been received, it is handled as any regular fulfillment item. It is added to the standard hold shelf item list and appears on the active hold shelf or expired task lists. The patron loan will be executed through the patron services workbench. For a digital request, if the automatic receive parameter in the broker configuration is set to no, the staff manually flags a receive action for this request.
Recall/Renew Items

This section refers to step 7 of the broker borrowing workflow diagram.

For loan renewal, a RenewItem message is sent to the broker, which then notifies the lender that a renewal has been requested. When the lending institution responds to the broker to either approve or reject the request, the broker returns the message to Alma with the lender's response.

For loan recall, if a lending institution issues a recall, the broker will send a RecallItem message to Alma.

For more information about renewals in a broker system, see the More Information About Resource Sharing Broker Renewals video (17:02 mins).

For more information about recalls in a broker system, see the More Information About Resource Sharing Broker Recalls video (13:15 mins).

Return Item to Lender

This section refers to step 8 of the broker borrowing workflow diagram.

The return process is controlled by the broker system. The broker sends a CheckinItem message to Alma. This message triggers Alma to close out the request and delete the temporary items that were previously created. The temporary items are:

- A temporary BIB record, which is automatically suppressed
- A temporary holding
- A temporary item
- A hold request linked to the temporary item

For a broker borrowing demo, see the More information About Broker Resource Sharing (Borrower Demo) video (25:35 mins).
Broker Based Resource Sharing - Lending

The checkout process starts when the request is submitted to the broker and a lender is assigned the request. The lending library receives the new request, and the operator at the lending library starts the checkout process described below. Digital and physical workflows are supported in this process.

Actions are taken on the received messages. Please refer to the Developer Network for a detailed description of how Alma identifies these messages as related to requests for digital supply:

- NCIP: https://developers.exlibrisgroup.com/alma/integrations/resource_sharing/broker/ncip/application_profile/v2
- SLNP: https://developers.exlibrisgroup.com/alma/integrations/resource_sharing/broker/SLNP/Messages

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

Broker Item Checkout

The broker lending workflow describes the entire lending workflow including steps that take place entirely in the broker system. Those steps that take place in the broker system are indicated in the blue-shaded boxes. The process of fulfilling a lending request occurs at the lending library after a resource sharing request has been created. The following is a detailed description of the steps within this workflow (with the numbers corresponding to the numbers in the diagram):

1. The broker updates the request status to Document Received.
2. The broker may send an `RequestItem` message to Alma.

3. A pick slip may be generated from either the broker system or from Alma. If the pick slip is generated in Alma, a move request is also created. The item then follows a standard fulfillment lifecycle for pickup at shelf, scanning items, and shipping items.

4. The broker sends a `CheckOutItem` message to Alma. For a physical request, the broker confirms that the item is checked out in Alma. For a digital request, the request will be marked completed as long as Receive Digitally is not marked in the Workflow Profile. This actions is equivalent to a shipping action, see `Shipping Items`.

For more information about digital document delivery of resource sharing requests, see the More Information About Digital Fulfillment of Resource Sharing Requests video (18:43 mins).

5. For renewal:
   1. When the borrower requests a renewal, a `RenewItem` message is sent from Alma to the borrowing broker. The message includes item information and the desired due date and is sent for all NCIP system types. You must configure the Broker System NCIP URL in the partner record to successfully send this message (see NCIP Parameters).
   2. The lending broker sends a message to Alma, where the lending request is either approved or rejected.
   3. When the broker on the borrower side receives an approval of the renew request, Alma is notified with the `RenewItem` NCIP message.

   For more information about renewals in a broker system, see the More Information About Resource Sharing Broker Renewals video (17:02 mins).

For recall:

   1. If a shipped item is requested by a local patron, the recall is issued from the lending institution’s Alma to its broker system. The `RecallItem` message is sent to the lending broker.
   2. The lending broker notifies the requesting institution that an item has been recalled.

   For more information about recalls in a broker system, see the More Information About Resource Sharing Broker Recalls video (13:15 mins).

6. An operator at the borrowing library receives the checked out item from the patron for check in and ships it back to the lending library. The broker’s loan tracking updates the request status to Returned.

7. The broker sends an `CheckInItem` message to Alma. Broker confirms that the item has been checked in to Alma. In Alma, the lending request is marked as Completed, and the loan’s status is marked as Released.

For a broker lending demo, see the More information About Broker Resource Sharing (Lender Demo) video (17:38 mins).
Peer to Peer Resource Sharing - Borrowing

Creating a Resource Sharing Borrowing Request

*This section refers to step 1 of the Peer to Peer Borrowing Workflow diagram.*

This section describes a sample workflow for submitting resource sharing requests using the peer-to-peer process. For a
step-by-step procedure for creating borrowing requests, see Managing Resource Sharing Borrowing Requests.

1. **Alma** - The request may be created from:
   
   ◦ A local search

   ![Borrowing Request Local Search](image)

   Borrowing Request Local Search

   See [Adding a Resource Sharing Borrowing Task From a Search](#)

   ◦ A network zone search, if applicable

   ![Borrowing Request Search Network Zone](image)

   Borrowing Request Search Network Zone

   ◦ A blank form

   ![Manual Borrowing Request](image)

   Manual Borrowing Request

   See [Manually Adding A Request](#)

   ◦ From an external source
Borrowing Request External Search

See [Adding a Request From an External Resource](#)

2. **Primo** - A borrowing request may be created from:
   - The Get It pane
   - A blank form
   - The Citation Linker
It is recommended to use the Citation Linker rather than using a blank form for the request, if it is permitted by the library’s policies.

For more information on using the Citation Linker, see Citation Linker.

3. **Other discovery platforms** - A discovery system can send an OpenURL with a borrowing request to Alma. For more information on mapping the URL, see Mapping the OpenURL Form to the Resource Sharing Request.

4. **A customized local form (via an API)** - A form may be created by the institution using the borrowing request API. For more information, see the Developer Network.

---

**Rota Management**

*This section refers to step 2 of the Peer to Peer Borrowing Workflow diagram.*

Rota templates enable quickly attaching a group of partners to the request, instead of manually adding partners one-by-one. For more information, see Resource Sharing Partners and ROTAs.

- **Create rota** - Define the list of partners whose collections will be searched for the item availability
  - Rota may be created manually using the **Add Partners** or **Add Rotas** buttons on the request.
Add Partners or Rotas to a Borrowing Request

- Rota may be created automatically using the rota assignment rules and the rota templates.

- Verify rota (also known as the Locate process) - Verify that potential lenders are relevant. Partners that don’t meet the verifications are automatically removed from the rota. Verifications may be done on various attributes, such as:
  - Does the partner have the requested item?
  - Is the item currently available?
  - Is the item available for resource sharing requests?

**Note**
Verification of item availability and eligibility for resource sharing is only relevant if the partner is another Alma institution.

For more information on the locate process, see Locating Items.

Sending a Resource Sharing Request

*This section refers to step 3 of the Peer to Peer Borrowing Workflow diagram.*

The send process may be executed automatically, using the sending borrowing request rules, or manually, using the Send button on the task list.

**Note**
The actual steps triggered by the send action are dependent on the partner type (ISO, NCIP, email, etc.).

Canceling a Resource Sharing Request

*This section refers to step 4 of the Peer to Peer Borrowing Workflow diagram.*

The borrower may perform a cancelation for a request that has already been submitted to the lender. The request must be:

- Active
- Not loaned
- Not shipped
- Allowed in the workflow profile

A request may be canceled in three ways:

1. The request may be canceled from a row action. This option fully cancels the request. The current partner is removed. All pending partners are also removed so that the request doesn't move on to another partner.
2. The request may be canceled from Primo. This option fully cancels the request.

3. Edit the request and select the Rota tab. Select Cancel next to a partner. This option cancels only this partner but leaves the request active. A cancelation message is sent to the partner and if there are more partners, the next partner in the rota is activated.

Canceling a request generates a message that is sent according to the partner configuration. When a request is fully canceled, the status will be changed according to the workflow profile.

If an item is on the hold shelf when it is canceled, the hold request is canceled and the borrowing request is marked as completed.

If the library has received an item but the patron has not yet picked it up, the patron can cancel the hold request but the borrowing request will stay active.

**Rejecting a Resource Sharing Request**

*This section refers to step 4 of the Peer to Peer Borrowing Workflow diagram.*
Request rejects are initiated by the lender to indicate that the lender is unwilling to fulfill the request.

A rejection may be performed if the request is active and the item is not shipped.

---

**Receiving an Item from a Resource Sharing Request**

*This section refers to step 6 of the Peer to Peer Borrowing Workflow diagram.*

The following system components are utilized at the time that the item is received from the lender:

- A temporary BIB record, which is automatically suppressed
- A temporary holding
- A temporary item
- A hold request linked to the temporary item

**Note**

These components are actually created when the request was created, even though the first time that the operator will use them is at receiving time.

An item may be received in the following places: Receive Items, Scan In Items, and the Receive link on the task list. It is highly recommended to utilize the Receive Items page as it is the dedicated interface for receiving resource sharing items. It offers additional options such as indicating receipt of a digital item, and setting due date, item policy, and location. When the item is received, a temporary barcode is attached to the item. The item then goes to the hold shelf for pickup or into transit. For detailed information on receiving items, see Receiving and Shipping Items.

A lending institution may send a digital request directly to the patron if the request included a patron email address. Otherwise, it will be sent to the library, which will receive it at this point. The operator verifies the digital item and sends it to the patron, closing the request at the same time.

For more information about digital document delivery of resource sharing requests, see the More Information About Digital Fulfillment of Resource Sharing Requests video (18:43 mins).

---

**Managing a Resource Sharing Loaned Item**

*This section refers to step 7 of the Peer to Peer Borrowing Workflow diagram.*

Once a requested item has been received, the Borrower Receive Email letter is sent to the lending institution if it is an email partner. The item is then handled as any regular fulfillment item. It is added to the standard hold shelf item list and appears on the active hold shelf or expired task lists. The patron loan will be executed through the Manage Patron Services. The patron return may also be done through the Manage Patron Services or the Return Items page.

---

**Returning a Resource Sharing Item to the Lender**

*This section refers to step 9 of the Peer to Peer Borrowing Workflow diagram.*

Returns may be done from the Scan-In Items interface or from the Return action on the task list. The temporary BIB record, temporary holding, and temporary item are removed from the system. The returned item is then shipped back to the lending...
institution. If the lending institution is an ISO partner, the Returned ISO message is sent to the partner. If the lending institution is an email partner, the Borrower Return Email letter is sent. The request may then be terminated and labeled as complete, or it may remain open while waiting for a response from the lender. The behavior is dependent on the Lender Check In action of the partner's lending workflow profile. See workflow profile configuration and More Information About Resource Sharing Workflow Profiles.

The Resource Sharing Return Slip Letter is printed when returning a borrowing item to the lender. For more information, see Configuring Alma Letters.

In addition to the Peer-to-Peer workflow, Broker-Based Resource Sharing defines the workflow for borrowing requests that interact with a broker system.
Peer to Peer Resource Sharing - Lending

Resource sharing libraries may manage the processes of both borrowing and lending. The workflow below outlines the resource sharing lending process. The protocols currently used for peer-to-peer sharing are ISO or NCIP. For more information on the ISO and NCIP protocols, see the Developer Network. For information on the borrowing process, see Peer-to-Peer Resource Sharing - Borrowing.

For more information on resource sharing, see the Resource Sharing video (1 hour 12:31 mins). It is also recommended that you watch the detailed Ask the Expert sessions on resource sharing.

Lending Workflow
Creating a Resource Sharing Lending Request

This section refers to step 1 of the Peer to Peer Lending Workflow diagram.

- Create Lending Request Manually - Add a lending request, either manually (see Adding a Resource Sharing Lending Task Manually) or using search (see Adding a Resource Sharing Lending Task From a Search).

- Create Lending Request Automatically - from an ISO, NCIP Peer to Peer, or SLNP message.

- The request may also be created at the time of shipping when the item is scanned.

Physical Request

Create Move Request

This section refers to step 3 of the Peer to Peer Lending Workflow diagram.

For a physical item request, the process is the same as a temporary move request in the standard fulfillment flow (see Manage Fulfillment Options). No loan is created. Rather, the target destination is changed to the resource sharing library (see Moving Items) and the item's due back date is changed accordingly. The item status is set to Item Not In Place. If not previously created, the lending request may also be created at this point. Additional configuration is needed to allow the lending request creation here (see Shipping Items and Configuring Parameters of a Resource Sharing Library).

Ship Physical Item to Borrowing Library

This section refers to step 5 of the Peer to Peer Lending Workflow diagram.

The physical item is sent to the borrowing institution, where it is received by the resource sharing partner (see Shipping Resource Sharing Lending Request Resources). This may be done through the Shipping Items page or from the action on the request in the Lending Request Task List. See Managing Resource Sharing Lending Requests for detailed information on the Lending Request Task List.
Renew/Recall/Overdue Handling

This section refers to step 6 of the Peer to Peer Lending Workflow diagram.

Renewing a shipped item happens as a result of a borrower request. The renew action may be done manually or automatically. It may be triggered by a patron request or a staff request on behalf of a patron.

Items that have been shipped may be automatically recalled if the recall function has been enabled in the workflow profile. Alma will automatically mark ISO and email lending requests whose due date has arrived as **Overdue request**. For email partners, the Lending Recall Email Letter will be sent. For ISO partners, an ISO message will be sent.

Check In Physical Item

This section refers to step 7 of the Peer to Peer Lending Workflow diagram.

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

Digital Request

Create and Send Digital Item

This section refers to step 3 of the Peer to Peer Lending Workflow diagram.

For a digital item request, the process is similar to a digitization request, based on the digitization and copyright rule workflow (see Digitization Processing). Create a digitization request in order to ship digitized material. When processing digitization, a rule must be configured to be use the document delivery service (see Configuring Digitization and Copyright Rules). Fulfilling digital resource sharing requests using the link document delivery option is only available for ISO partners.

If the digitization and copyright rules are set to require approval, the process waits for the approval before sending the item.

For more information about digital document delivery of resource sharing requests, see the More Information About Digital Fulfillment of Resource Sharing Requests video (18:43 mins).

Wait for Borrower Notification that Item was Received

This section refers to step 5 of the Peer to Peer Lending Workflow diagram.

Depending on the workflow options selected, the request may not change to a closed status until a response is received from the borrowing institution that the digital item was received.
RapidILL Based Resource Sharing Workflow

To configure the integration between Alma and the RapidILL system, you must have the following role:

- Resource Sharing Partners Manager

This page describes the configurations necessary to integrate RapidILL into the Alma resource sharing workflow. This allows all workflow activities on both the borrower side and the lender side to be performed within Alma. The different workflow options for the borrower and lender sides are described showing how RapidILL is integrated seamlessly into the Alma interface.

---

**Note**

This document describes the Alma required configurations. Additional activation is required in Rapid ILL. Contact Ex Libris Alma support for this activation.

---

This page contains the following sections:

- Configuring Alma to be Integrated with RapidILL
- RapidILL Workflow
- Additional Borrower Actions

### Configuring Alma to be Integrated with RapidILL

Perform the following steps to integrate RapidILL with Alma.

- Configure RapidILL as a Resource Sharing Partner
- Configure a Rota Template with RapidILL as a Member
- Configure a Rota Assignment Rule
- Configure Other Settings

### Configure RapidILL as a Resource Sharing Partner

You configure RapidILL as a resource sharing partner from the Resource Sharing Partner page (Fulfillment > Resource Sharing > Partners > Add a Partner).

For the **Profile Type** and **System Type**, select RapidILL. Fill out the other fields on this page as described at Resource Sharing Partners.
Resource Sharing Partners

On the Parameters tab, for the Default Library Owner, select the library to be used when creating lending requests. Lending requests received from RapidILL are created in the Resource Sharing Library that you select. Fill out the other fields on the Parameters tab as described at RapidILL Parameters.

Configure a Rota Template with RapidILL as a Member

Configure a Rota template from Fulfillment > Resource Sharing > Rota Templates > Add a Template.

Rota Templates – General Information Tab

From the Template Members tab, add RapidILL as a member of the Rota template.

Rota Templates – Template Members Tab

For more information, see Configuring Rota Templates.

Configure a Rota Assignment Rule

Configure a rota assignment rule to automatically assign any digital borrowing request to the RapidILL rota template. You configure rota assignment rules from Configuration > Fulfillment > Resource Sharing > Rota Assignment Rules:
Select Add a Rule:

Rota Assignment Rules

Add a rota assignment rule to use the RapidILL rota template you created when the requested format is digital.

For more information, see Configuring Rota Assignment Rules.

Note

It is recommended that this rule be first in your list of rota assignment rules.

Configure a Sending Borrowing Request Rule

Configure the Sending Borrowing Request Rule to automatically send the digital borrowing request to RapidILL. Configure the rota assignment rules from Configuration > Fulfillment > Resource Sharing > Sending Borrowing Request Rules:
The Sending Borrowing Request Rule is activated only if the library is set up to automatically locate. The **Automatically activate locate profile** option should be selected at the Resource Sharing Library configuration (**General > Add a Library or Edit Library Information**).

**BORROWING SETUP**

- Cancel request on locate failure
- Automatically activate locate profile
- Temporary inactive for borrowing
- Default location: **Closed Location Type: Borrowing Requests**
- Default pickup location: **Main Library**

**LENDING SETUP**

- Automatically locate

---

**The Document Delivery Page**

The document download page that Alma opens when the patron clicks on the email link uses your institution’s CNAME (e.g. institutionA.alma.exlibrisgroup.com) and not the classic link (e.g., ap01-.alma.exlibrisgroup.com/institution/01INSTITUTIONA_INST) link. This may require updates by your IT if you have not authorized the CNAME URL.

In addition, the document download page uses the logo that is defined in your **General > Alma Logo and Color Scheme** menu as the login page logo. For example:

![Ex Libris Alma](image)

**Download completed successfully**

---

**Configure Other Settings**

Configure the following parameters located at **Configuration > Fulfillment > General > Other Settings** as follows:
## Other Settings Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Default Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>rapidill_extended_borrowing_integration</td>
<td>false</td>
<td>Set to <strong>true</strong> to activate the integration options on the <strong>borrower</strong> side.</td>
</tr>
<tr>
<td>rapidill_extended_integration</td>
<td>false</td>
<td>Set to <strong>true</strong> to activate the integration options on the <strong>lender</strong> side.</td>
</tr>
<tr>
<td>rs_keep_rejected_request_active</td>
<td>borrowing</td>
<td>Keep rejected resource sharing requests active as a borrowing request to keep it open if it is rejected by RapidILL.</td>
</tr>
<tr>
<td>borrower_document_delivery_maximum_views</td>
<td>2</td>
<td>The maximum number of times patrons are be able to access the link for RapidILL document delivery.</td>
</tr>
<tr>
<td>borrower_document_delivery_send_automatically</td>
<td>true</td>
<td>Whether the email to the patron is sent automatically when a document is received on the borrower side.</td>
</tr>
<tr>
<td>document_delivery_cleanup_days</td>
<td>Default: 30</td>
<td>Maximum: 90</td>
</tr>
</tbody>
</table>

### RapidILL Workflow

The standard workflow consists of the following steps:

1. The borrower makes a resource sharing request in Primo.
2. The request is sent to RapidILL – this is usually automatic but can also be done manually. The borrowing request information appears in Alma.
3. The lending library receives the request from RapidILL. The lending request information appears in Alma.
4. The lender can view the file, download it, and send it to the borrower in an email with a link to the file.
5. The borrower receives the email and downloads the file. This can be configured to be automatic or manual.

Other borrower workflow steps that are available:

- Cancel partner – the request to the RapidILL lender is cancelled and the request is sent to the next lender. (This action should be used infrequently.)
- Resubmit – resubmit a borrowing request:
  - when a request is rejected by a lender and the borrower needs to fix the request and resubmit it
  - When a resource was received not as requested
- View local resource – turns the borrowing request to a hold-digitization request

The following flowchart illustrates the RapidILL workflow:
The Request is Submitted and Sent to RapidILL

After the patron submits a resource sharing request, the request is sent to RapidILL according to the rota templates and assignment rules. The request information appears in Alma. You can have the request sent to the lender automatically or you can do so manually by selecting Send for the request.

The Request is Received by the Lender

The request is received by the lending library.
Resource Sharing Lending Request in Alma

The external ID is the same RapidILL ID as in the borrowing request. The partner is the Rapid ILL type partner, and the borrowing library is the library that made the resource sharing request.

The Lending Library Downloads the File and Sends it to the Borrower

The lending library can view the requested file. It downloads the file from the Manage Fulfillment Options link and sends it to the patron by selecting the Ship Digitally option. The request status is changed to Shipped Digitally and the request is automatically closed. The file goes to RapidILL, which then sends the file to Alma. For more information, see Managing Resource Sharing Lending Requests.

The following additional options are also available to the lending library:

- Reject (unfilled in Rapid) – send an unfilled state to RapidILL and send the request to another lender. You are not required to provide a reason.
- Bad citation – select this option if there is a problem with the request from the borrower. The request is set as rejected and sent back to borrower to be corrected and resubmitted. The lending library can add a note explaining the reason for rejecting the request.

Note

You do not necessarily get this request back after it is fixed. It may go to another lender.

The File is Delivered to the Patron

You can configure Alma to automatically send an email with a link to the patron or you can do so manually according to the borrower_document_delivery_send_automatically parameter. (See Configure Other Settings.)

Alma sends the Document Delivery Notification Letter to the patron. Refer to the zip file on the Developers Network blog for an example of the letter. From Configuration > General > Letters > Letters Configuration, select Upload letter example from the Letter Examples tab of the letter to upload this example.
**Automatic Delivery**

If Alma is configured to deliver the requested file automatically, the request status in Alma on the borrower side is set to **Request Completed**.

The patron receives an email with a link to the requested file. The letter is Alma’s Digitization Document Delivery Notification Letter, which must be activated.

The out-of-the-box letter has links to all Alma possible authentication methods – local/LDAP, SAML or CAS. The links do not require further configuration, but you can remove the authentication methods not relevant to your library and edit the text of the letter. For more information, see [Configuring Alma Letters](#).
Selecting an authentication link displays an authentication page. After authenticating, the requested file is displayed with a RapidILL cover page that is added automatically.

![Downloaded File with Cover Page](image)

Even with automatic delivery, the staff can view the file and resend it to the patron.

![Show File / Send File to Patron](image)

**Manual Delivery**

If Alma is configured to deliver the requested file to the patron manually, the request status in Alma is set to **Shipped Digitally**.
Manual Delivery

You can select the **Show File** option to review the file.

Select **Send File to Patron** to send the file to the patron. The patron receives the email as described in [Automatic Delivery](#).

---

**Additional Borrower Actions**

The following describe additional actions on the borrower side that are outside the standard workflow. (For more information, see [Managing Resource Sharing Borrowing Requests](#)):

- **The request is rejected by the lender** – If Rapid finds another lender, the request remains with the [RapidILL](#) partner, and the Lending Library field is updated with the new lending library. If RapidILL does not find another potential lender, Alma sends the borrowing request to the next partner in the rota.

- **The lender returns the request with a Bad Citation indication** – The request status changes to **Bad Citation**. See the Notes tab of the request for the lender’s comments. The Borrower can correct the request and select **Resubmit** to resend the request into the RapidILL workflow and receive a new external (Rapid ILL) ID.

---

**Note**

The request’s metadata must be updated before resubmitting the request.

---

- **Cancel Partner** – if no response to a borrowing request is received, the borrower can cancel the partner (lender) and move to the next lender in the rota.

---

**Note**

By default, requests that are not fulfilled are moved to another lender by RapidILL, so using this action should be used infrequently.

---

- **Local Resource** – When a request is sent to RapidILL, it checks if the requested item exists in your local holdings. If the item is held locally, RapidILL rejects the request. There are two options:
  - Select the **View Local Resource** option and change the request to a hold/digitization request.
  - If you nevertheless want to fulfill the request in RapidILL, for example, because the item is missing from the shelf or the RapidILL holdings update has not run yet, log in to RapidILL and select the **Override Local Holding** option.
Managing Resource Sharing Borrowing Requests

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

- Fulfillment Services Operator (in the scope of a resource sharing library)
- Fulfillment Services Manager (in the scope of a resource sharing library)

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

Workflow Actions

You can filter results using the Activity Status filter at the top of the page, where you can select to view All, Active, or Completed requests by default. If the Activity Status filter is set to All or Completed, you must enter a search term in the Find box for one or more specific requests. If there is no search term, the request list will remain empty, or only active requests will be visible. If additional inactive filters have been enabled in Borrowing Requests Inactive Filters, those filter options display as well. When selecting Completed, the task list refreshes with no records displayed, allowing you to search for completed requests only.

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

- **Status** – Status of the borrowing request.

  - Canceled by partner
  - Canceled by patron
  - Canceled by staff
  - Digitally received by library
  - Expired
  - Request completed - This is the final status before removal, and may be manually set. If the request is for an ISO partner, there must be a reply from the partner before the status will switch to Request completed.

Non-terminal (intermediate) statuses in the request process are shown below:

- Conditional – Appears only when Conditional is enabled in the borrowing workflow profile. See Adding Workflow Profiles.
- Created borrowing request
- Damaged communicated – Appears only when Damaged communicated is enabled in the borrowing workflow profile. See Adding Workflow Profiles.
- Declared lost by partner
- Expired
- Exported to third party
- Externally obtained
- Lender check in
- Loaned item to patron
- Locate failed
- Locate in process
- Lost communicated – Appears only when Lost communicated is enabled in the borrowing workflow profile. See Adding Workflow Profiles.
- Mediated patron renewal
- Overdue request
- Pending approval
- Physically received by library
- Ready to be sent
- Recalled by partner
- Received – not for loan
- Rejected by partner
- Renew request not accepted
- Renew requested
- Renewed by partner
- Report damaged item to partner – Same meaning as Damaged communicated.
- Report lost item to partner – Same meaning as Lost communicated.
- Request accepted
- Request sent to partner
- Returned by patron
- Returned item to partner
- Shipped digitally
- Shipped physically
- Waiting for cancel response
- Will supply

• Active Partner – The active partner in a request rota
• Creation Date – Date on which the request was created. Possible values are:
  - Today – Requests created on the current date
  - Yesterday – Requests created on the day before the current date
  - Up to three days ago – Requests created two or three days before the current date (excluding today and yesterday)
  - Up to a week ago – Requests created 4-7 days before the current date (in other words, excluding the above three options)
  - Up to a month ago – Requests created between 8 days and a month before the current date (in other words, excluding the above four options)
  - Older – Requests created more than one month before the current date
• Update Date – Date on which the request was updated. Possible values are the same as those for the Creation Date facet.
•Requested Format – The format of the requested item. Options are: Digital, Physical, and Physical non-returnable
• Supplied Format – The format in which the requested item was supplied. Options are: Digital, Physical, Physical non-returnable and Undefined
• Due Date – The date by which the item must be delivered. Possible values are the same as those for the Creation Date facet.
• Last Interest Date – The date after which the requester has indicated that they are no longer interested in the item
• Need Patron Information – Requests for which mandatory information has not been supplied by the patron
• General Messages – Requests which contain general messages of Type = Received. The operator may dismiss and activate general messages from the request's General Messages tab (see Sending a General Message With a Resource Sharing Request).

• Owning Library – The library which owns the requested resource

• Active Notes – The requests with notes marked as Active on the Notes tab.

• Pickup Location – Libraries, reading rooms, and personal delivery are all included in the facet

• Level of Service – The level of service assigned to the request.

To manage resource sharing borrowing requests:

1. Optionally configure the parameter check_patron_duplicate_borrowing_requests; see Configuring Other Settings.

2. On the Resource Sharing Borrowing Requests page (Fulfillment > Resource Sharing > Borrowing Requests), locate the requests you want to manage.

   You can select any of the following tasks in the Tasks List in the persistent menu (see Tasks in the Task List) to open this page with the relevant filter preset:
   ◦ Borrowing requests - New - with no partner
   ◦ Borrowing requests - Overdue
   ◦ Borrowing requests canceled by partner
   ◦ Borrowing requests recalled
   ◦ Borrowing requests returned by patron
   ◦ Borrowing requests with active general messages
   ◦ Borrowing requests with active notes

3. To add a request, select Add and select to add an item manually (Manually Adding a Request), from a search (see Adding a Resource Sharing Borrowing Task From a Search), or from an external resource (Adding a Request From an External Resource).

4. To manage a request, select the action for a request, as described in the following table:

   Resource Sharing Borrowing Request Page Links

<table>
<thead>
<tr>
<th>Link</th>
<th>Description</th>
</tr>
</thead>
</table>
   | Cancel| Cancel the request. Appears only when:
   |       | ◦ The request is still active
   |       | ◦ The request does not have a status of Loan
   |       | ◦ The request has not been shipped
   |       | ◦ No partner exists or the configured active partner supports the Cancel feature
   |       | When canceling a request, the request’s status becomes Canceled by staff.
   |       | You can also delete requests in Primo, on the My Account tab. When doing so, the borrowing request's status becomes Canceled. If an item is on the hold shelf when canceled in Primo:
   |       | ◦ The hold request is canceled
   |       | ◦ The item moves to the expired hold shelf
   |       | ◦ The request is marked as Completed
   |       | For details on the Primo My Account tab, see My Account.
   |       | When a request is canceled, a message is sent to the patron. The letter is Ful Cancel Email Letter. To configure the  

Ex Libris, a ProQuest Company
<table>
<thead>
<tr>
<th>Link</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>message, see Configuring Alma Letters.</td>
<td></td>
</tr>
<tr>
<td>Check Out to Patron</td>
<td>Marks that the patron received a physical non-returnable item and completes the request.</td>
</tr>
<tr>
<td>Conditional Reply</td>
<td>When an ISO message is sent from the lender, the borrowing request changes to Conditional status, and the Date for Reply field is displayed. When selecting this action, a window is displayed to select Yes or No in response to the condition specified by the lender. If the response is Yes, the request status changes to Sent and Date for Reply field is cleared. If the response is No, the status changes to Rejected by Partner and continues to the next partner in the rota.</td>
</tr>
<tr>
<td>Damaged</td>
<td>Send an email to the lender and set the status to Damaged communicated. Appears only:</td>
</tr>
<tr>
<td></td>
<td>◦ For email or ISO partners</td>
</tr>
<tr>
<td></td>
<td>◦ When the request is received by the library (and not as 'Physical non-returnable') and has not yet been returned to the partner</td>
</tr>
<tr>
<td></td>
<td>◦ When Damaged communicated is enabled in the borrowing workflow profile. See Adding Workflow Profiles.</td>
</tr>
<tr>
<td>Duplicate</td>
<td>Create 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 the Resource Information Fields table in Adding a New Book or Journal Article and Request Attribute Field table in Creating a Borrowing Request. When duplicating a Resource Sharing Borrowing request, the values in the following fields are copied to the new request:</td>
</tr>
<tr>
<td></td>
<td>◦ Title</td>
</tr>
<tr>
<td></td>
<td>◦ ISSN, ISBN (Metadata fields)</td>
</tr>
<tr>
<td></td>
<td>◦ Author</td>
</tr>
<tr>
<td></td>
<td>◦ Requester</td>
</tr>
<tr>
<td></td>
<td>◦ Owner</td>
</tr>
<tr>
<td></td>
<td>◦ Request Status</td>
</tr>
<tr>
<td></td>
<td>◦ Requested Format</td>
</tr>
<tr>
<td></td>
<td>◦ Delivery Location</td>
</tr>
<tr>
<td></td>
<td>◦ Request Note</td>
</tr>
<tr>
<td>Edit</td>
<td>Modify the request in the Resource Information dialog box (see Editing a Borrowing Request).</td>
</tr>
<tr>
<td>Edit Shipping Cost</td>
<td>This allows the user to update the shipping cost without opening the full edit form for the borrowing request. The option is also available for completed requests.</td>
</tr>
<tr>
<td>Externally Obtained</td>
<td>Sends a request using the GetItNow service. See Sending a Request for a CCC GetItNow Resource.</td>
</tr>
<tr>
<td>General Message</td>
<td>Send a general message with a borrowing request to a lender (see Sending a General Message With a Resource Sharing Request).</td>
</tr>
<tr>
<td>Locate Resource</td>
<td>Manually activates the Borrowing Locate process. This action only appears if the request has an assigned partner or rota. See Borrowing Locate Process.</td>
</tr>
<tr>
<td>Lost</td>
<td>Send an email to the lender and set the status to Lost communicated. Appears only:</td>
</tr>
<tr>
<td></td>
<td>◦ For email or ISO partners</td>
</tr>
<tr>
<td></td>
<td>◦ When the request is received by the library (and not as 'Physical non-returnable') and has not yet been returned to the partner</td>
</tr>
<tr>
<td></td>
<td>◦ When Lost communicated is enabled in the borrowing workflow profile. See Adding Workflow Profiles.</td>
</tr>
<tr>
<td>Link</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Purchase Request            | For Fulfillment Services Operators / Managers with the appropriate privilege enabled, you can create a purchase request with the information in the borrowing request. If the borrowing request is inactive, you are taken directly to a purchase request form. If the borrowing request is active, a window is displayed to select whether to cancel the borrowing request or keep the borrowing request active alongside the purchase request. The purchase request's requester field will be populated so that:  
  ◦ If the resource sharing request was canceled, the field will be populated with the requester from the original borrowing resource sharing request.  
  ◦ If the resource sharing request was inactive or kept active, the requester field will be populated with the logged in user’s ID. |
<table>
<thead>
<tr>
<th>Link</th>
<th>Description</th>
</tr>
</thead>
</table>
| Remove | Remove the request. Appears only when the request's status is one of the following:  
- Returned item to partner  
- Request completed - The request was either delivered or canceled before it reached the hold shelf.  
- Shipped digitally  
- Canceled by partner  
- Cancel requested |
| Renew | Renew a resource sharing borrowing request. A dialog box appears, where you enter a due date for the request and an optional note in the Internal note and/or Note to partner fields. For details on these fields, see step 3 in Rejecting a Borrowing Request. The request status is changed to Renewed by Partner. For more information, see Managing Borrowing Renewals.  
This option appears when Staff renewal is selected for lending requests in the Resource Sharing Lending Workflow Profile (see Configuring Workflow Profiles).  
If the request is renewed, a message is sent to the patron and a renewal fee may be charged. The letter is Ful Borrowing Info Letter. To configure the message, see Configuring Alma Letters. A resource sharing renew fee is set as part of a fulfillment policy; see Adding Fulfillment Policies.  
For more information about requesting renewal of a borrowing request, see the ISO ILL: Request Renewal video (10:06 mins). |
| Request Renew | Renew a resource sharing borrowing request under the following conditions:  
- A Resource Sharing Lending Workflow Profile exists with Staff Renewal enabled.  
- The partner is not part of a fulfillment network.  
- The item has arrived.  
- The item has not been returned.  
A dialog box appears, 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.  
If the request is renewed, a message is sent to the patron and a renewal fee may be charged. The letter is Ful Borrowing Info Letter. To configure the message, see Configuring Alma Letters. A resource sharing renew fee is set as part of a fulfillment policy; see Adding Fulfillment Policies. |
<p>| Resend Patron Email | For digital requests with document delivery, the email may be resent may be resent to the patron. |
| Return | Appears when the request is received by the library (and not as 'Physical non-returnable') and has 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). |</p>
<table>
<thead>
<tr>
<th>Link</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>The Resource Sharing Return Slip Letter</strong></td>
<td>The Resource Sharing Return Slip Letter is printed when returning a borrowing item to the lender. For more information, see <a href="#">Configuring Alma Letters</a>. For more information about the returning items to the lender, see the ISO ILL: Lender Checked-in Message video (8:35 mins).</td>
</tr>
<tr>
<td><strong>Send</strong></td>
<td>Appears 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). The parameters displayed are those selected for the partner during the partner configuration process (see Resource Sharing Requests).</td>
</tr>
<tr>
<td><strong>Send Query to Patron</strong></td>
<td>Display the query types configured on the Patron Query Types Code Table page (see Configuring Patron Query Types). The Select email template dialog box appears to select the email template you want to be used for the query. The dialog box also contains a Note to Patron field for a free text note to be included on the Query to Patron letter (QueryToPatronLetter). If there is only one template type of Query to Patron, the dialog box will appear with just the Note to Patron field available for input. For details on system behavior when selecting this option, see Configuring Patron Queries.</td>
</tr>
</tbody>
</table>
| **Status Query** | Request a status update from the lending institution. This is only applicable to ISO partners. The returned borrower ISO status is recorded in a note. Each ISO status corresponds to the following Alma request statuses:  
- Not supplied - Rejected by partner, Locate failed, Canceled By Patron, Expired  
- Pending - Created borrowing request, Request sent to partner, Ready to be sent, Locate in process, Will Supply, Pending Approval  
- In Process - Loaned item to patron, Returned by patron, Renew request not accepted, Renewed by partner, Renew requested, Renew Accepted, Mediated Patron Renewal, Exported to third party, Manual renew, Automatic renew, Waiting for receive digitally  
- Cancel Pending - Cancel request not accepted, Waiting for cancel response  
- Canceled - Canceled by partner, Canceled by staff  
- Shipped - Shipped Digitally, Shipped Physically  
- Received - Physically received by library, Digitally received by library, Received - not for loan  
- Overdue - Overdue request  
- Returned - Returned item to partner  
- Checked In - Request Completed, Lender check in, Externally Obtained  
- Recall - Recalled by partner  
- Lost - Report lost item to partner, Declared lost by partner  
- Unknown - Report damaged item to partner |
| **View** | View request information. Appears only when the request’s status is one of the following:  
- Returned item to partner  
- Request completed - The request was either delivered or canceled before it reached the hold shelf.  
- Shipped digitally  
- Canceled by partner  
- Cancel requested |
| **View Local Resources** | If local resources exist but a borrower creates a resource sharing request, you can view the local resources for the request (see Viewing Local Resources on a Borrowing Request). |
| **View Network Resources** | Opens the Network Zone search results list. The search parameters are the same as they are for View Local Resources. If a query cannot automatically be created (for example, the locate by field OCLC does not exist in the request), a query will run with a single condition of Tag Suppressed equals false. See Adding Network Partners to Resource Sharing Rota. |
You can perform actions on multiple requests simultaneously using the following actions:

- **Change Status** – Select the requests, select a status, and select Change Status.

  **Note**
  When the status of a request is changed from Report lost item to partner or Report damaged item to partner to Completed, the temporary item is removed and the loan is closed.

- **Remove Requests** – Select the requests and select Remove Requests. The requests are removed from Alma. After the request is deleted, it is viewable only in analytics.

---

**Reassigning a Task**

You can reassign a task only if you are assigned the task or if it is unassigned. A user with a Fulfillment Services Manager role additionally has access to the **Assigned to Others** tab, where that user can manage all requests, regardless of their assignment.

**To reassign a task:**


2. From the Assign to drop-down list, select an operator. 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. Select Assign To.

---

**Sending a Query to the Patron**

Depending on the configured patron query templates settings (see Configuring Patron Queries), one of the following occurs:

- If you are using patron query templates, and there is only one template, and if Edit if Single is set to true, the Email Message dialog box opens. This is where you configure a message to send to the patron by email.
The Subject field contains 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 select Send Email.

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 Workflow Profiles.
For details on borrowing resource requests activities, see Managing Resource Sharing Borrowing Requests.

- If you are using patron query templates, and there is only one template, and Edit if Single is set to false, the query is immediately sent.
- The query is also sent immediately if you are using patron query types and there is only one type defined.
- If you are using patron query templates and there is more than one template – The Select Email Template dialog box appears, where you select the template you want to use.

Select E-Mail Template Dialog Box

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

The dialog box also appears if you are using patron query types and there are multiple types defined. In this case, only the Send Email button appears.

### 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 appears on the request's General Messages tab when selecting Edit or View for the request.
General Messages can be sent only if:

- The request is an ISO or NCIP-P2P 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.

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. A General Message can also 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 or NCIP-P2P request. Select **General Message** from the row actions list. The General Message dialog box appears.

2. In the **Message** field, enter a message and select **Send**. The message is sent to the lender using the General Message Email Letter. The request is limited to 1,000 characters.

3. 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 select **Edit**. The Resource Sharing Lending Request page opens.

4. Select the **General Messages** tab. The General Messages page appears, and the general message sent by the borrower appears in the table with **Type = Received**.

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

You can view requests that have received messages (messages of **Type = Received**) that are active by selecting 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 selecting either the **Lending request with active general messages – unassigned** or the **Lending request with active general messages – assigned to you** links on the Tasks list.
Viewing Local Resources on a Borrowing Request

If local resources exist but a borrower creates a resource sharing request, you can view the local resources for the request. Viewing the local resources can be done while creating the resource sharing request, or after the request has already been created. In either case, the operator may decide to place a local hold request on the matching local resource. If this is done within the process of creating the resource sharing request then the resource sharing request will not be created.

To view matching local resources while creating a resource sharing request:

1. Enter a borrowing request. If the requested item already exists in the local institution, the self-ownership pop-up appears.
2. Select View Local Resources to bring up a listing of the matching local resources.
3. Select Request from the local item to abort the borrowing request and create a local request. A confirmation message appears.
4. Select Confirm Request on the resource listing (Local Resource List) or Confirm on the self-ownership pop-up (Self-ownership Pop-up) to continue with the creation of the borrowing request rather than place a local hold request. The request appears in the Resource Sharing Borrowing Requests List. The local resources can still be accessed from this point. Each request has a link to View Local Resources.
5. Select **View Local Resources** to return to the resource listing ([Local Resource List](#)). You can still create a local request even though the resource sharing request has already been placed. Select **Request**, and select **Confirm** in the confirmation dialog box.

---

**Viewing Borrowing Request Actions**

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

The **History** tab may be viewed in full mode or in brief mode. You can configure what type of lines will display in brief mode.

**To view resource sharing borrowing and lending request actions:**


2. Select the **History** tab. The **History** tab displays the list of actions performed on the resource sharing borrowing or resource sharing lending request. Select **Full** view mode to display all records for the request. Select **Brief** to display only those enabled in the configuration page **Brief Audit Fields** (see [Configuring Brief Audit Fields](#)).

---

**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. Rejection may be communicated automatically, depending on the partner type.

To manually reject a request in the borrowing institution, select **Reject** from the row actions list of a borrowing requests. The reject action also appears in the **Rota** tab of the request and in the list of actions available on the pull down menu at the top of the borrowing requests page.

There is a lending workflow option, **Reject**, that controls whether the manual reject action appears on the action list of the request and on the rota tab. The option is enabled by default and will allow the reject button to be visible. If the workflow...
option is disabled, the reject action will not appear. Reject will still be an option on the pull down menu, but selecting it while the workflow action has been disabled will cause an alert to appear at the top of the page and the reject action will not be executed. Hiding the reject action may be especially useful for ISO requests, where the rejection is expected to be received as a message sent by the lender.

Once a request is rejected by the lender, the next partner in the rota becomes active. The request may be sent to the next partner automatically, depending on the Sending Borrowing Request Rules set up by the institution.

The rs_keep_rejected_request_active customer parameter determines if a request stays in an active status, even after it is rejected by the last partner in the rota. When the parameter is set to None, which is the default, the request will be completed and will not be visible in the active requests queue. Alma will also send a cancelation message to the patron. When the parameter is set to Borrowing or Both, the request will remain in the active requests queue so the staff librarian will have the option to work on the request. With this setting, Alma will not send a cancelation message to the patron. This functionality applies only to rejections that occur after the parameter is changed. For more information, see Configuring Other Settings (Fulfillment).

To mark a request as rejected by the lending institution:


![Reject Request Pop-up Window](image)

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

3. Optionally, add a note in either or both of the following fields: This note appears in the following format: <Name of partner><Note text>

   - Internal note: A note that appears only on the side from which it is sent (that is, when configuring a note from the borrower, the note appears only in the list of borrowing requests. When configuring a note from the lender, the note appears only in the list of lending requests). These notes do not appear on the History tab, and are to be used for notes not intended to be publicized (that is, they are not sent to the peer partner). An example of a note would be a borrower writing, This lender has historically been difficult to deal with.

   - Note to partner: The note that is sent to the partner. This note appears in the Notes tab of both the sender of the note and the receiver of the note, and on the request's History tab (i.e. – Only in reading room).

4. Optionally, select Notify user to send a notification to the requesting patron regarding the rejection.

5. Select 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. (Select the Edit link for the request to view the Notes tab. You can also select Borrowing requests with active notes from the Tasks list. This link leads to the Resource Sharing Borrowing Requests page, filtered by Notes from Partner.)
Managing an Overdue Borrowing Request

Alma automatically marks ISO and email lending requests whose due date has arrived as Overdue request. In addition, Alma automatically sends ISO and email messages about these requests to the borrower. When using ISO, Alma automatically updates the borrower’s request status based on this message.
Configuring Rota Templates

To configure rota templates, you must the following role:

- Resource Sharing Partners Manager

For more information about rotas, partners, and rota templates, see Requests in Alma.

Rota templates can be either ordered or non-ordered. In an ordered rota template, unfulfilled request proceed to the next partner in the list. In a non-ordered rota, requests are sent to partners in a random order.

You configure rota templates on the Rota Templates page (Fulfillment > Resource Sharing > Rota Templates):

![Rota Templates Page]

In a collaborative network, you can configure rota templates in the Network Zone and have the changes distributed to the member institutions by a job. For more information, see Configuring Fulfillment Information in the Network Zone.

---

**Note**

Rota templates can be configured at the institution or library level. Select the required institution from the Configuring filter.

---

The following actions can be performed on this page:

- Add a rota template (see Adding Rota Templates)
- Edit a rota template (select Edit from the row actions list)
- Duplicate a rota template (select Duplicate from the row actions list; available only when a library is selected in the Configuring filter on the Fulfillment Configuration page).
- Reorder template members (select Reorder Members from the row actions list; available for ordered templates only)
- Delete a rota template (select Remove from the row actions list)

Learn about managing rota templates on the library and institution levels in the Managing Rota Templates per Library and Institution video (6:06 mins).

**Adding Rota Templates**

You can add a rota template.
To configure rota templates:

2. In the Code and Name fields, enter values for the template code and name, respectively.
3. In the Type field, select Non Ordered or Ordered.
4. Select Save and Add Members. The Template Members page appears.
5. Browse for a partner in the Partner field (you can select multiple partners) and select Add Partners. The selected partners appear in the table on the Template Members tab.
6. For an ordered template, 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 to move the selected partners. Select Move Selected.
     Partners receive unfulfilled resource borrowing requests according to their order in the rota.
7. Select Save.

ILLiad as a Supplier of Last Resort

ILLiad can be fully integrated with Alma in a peer-to-peer rota as a supplier of last resort. If all rota partners fail to fulfill the request, the request can be automatically transferred to ILLiad where the request can be attempted with the broader ILLiad managed rota. This will save a step for the patron that previously received an email saying that the request could not be fulfilled with a link to ILLiad.

If the partner is defined as ILLiad in the System Type field, the Send action generates a message with the request details and the metadata of the request that is sent directly to a configured email address. ILLiad should be configured to upload emails from that email address and create internal borrowing requests based on the emails’ content. The metadata that is sent is dependent on the fields that are available in the request.
Creating a Borrowing Request

Manually Adding a Borrowing 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), select Add > Manually. The Citation Type dialog box appears.

   **Note**

   To add a request using search, select From Search instead of Manually (see Adding a Resource Sharing Borrowing Task From a Search).

2. In the Citation type drop-down list, select one of the following options and then select Choose:
   - **Book** – The following page appears:
Article – The following page appears:
If the PMID or DOI fields are populated at creation time, whether created in Alma, Primo, or via the API, the following fields are auto-populated (please note that auto-populated fields cannot be edited).

- Article Title
- Journal Title
- Author
- Volume
- Issue
- ISSN
- Pages
- Start Page
- End Page
- Publication Date

The data is augmented with an augmentation integration profile is active. The augmentation will not be performed if the borrowing request is created from a broker system.

1. In the **Resource Information area**, enter the information in the relevant fields. For more information on these fields, see *Adding a New Book or Journal Article*.

   **Note**
   
   If an article title is not entered, the article title and BIB title (245) are both be populated with the journal title.

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

   **Request Attribute Fields**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specific Edition Only</td>
<td>Whether the request sends information on the borrowed resource's edition to the lending library.</td>
</tr>
<tr>
<td>Requester (Required)</td>
<td>The user that is requesting the item.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong></td>
</tr>
<tr>
<td></td>
<td>When creating a request from a citation, this value is pre-filled by the <code>citation_rs_default_requester</code> parameter; see Configuring Other Settings.</td>
</tr>
<tr>
<td></td>
<td>The <strong>Owner</strong> field changes depending on the user you select here; see the note, below.</td>
</tr>
<tr>
<td>Owner</td>
<td>The 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 an Institution and Its Libraries).</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Request status</td>
<td>The status of the request; see Request Status.</td>
</tr>
<tr>
<td>Requested format</td>
<td>Format of the requested item – Digital, Physical, or Physical non-returnable. For more information about sending resource sharing items directly to a patron, see the Inter-Library Loans Personal Delivery video (10:51 mins).</td>
</tr>
<tr>
<td>Requested media</td>
<td>The type of media in which you want the request to be supplied. The values that display in the drop-down field are those configured with a value of True on the Requested Media Definition Mapping Table page (see Configuring Requested Media Definitions). When a request is submitted with a requested media type that was added to the out-of-the-box options (see Configuring Additional Requested Media) and the request is sent to an ISO partner, the partner receives the requested media information in the Request Note field.</td>
</tr>
<tr>
<td>Allow other format</td>
<td>Whether, if the requested format is unavailable, the patron is willing to receive the item in another format.</td>
</tr>
<tr>
<td>Partner</td>
<td>The first partner configured in a request’s rota (see Requests in Alma). Select Add Partners to add a partner to the request’s rota, and select Add Rotas to add a rota template (group of partners). For details on adding partners, see step 6, below. For details on adding rota templates, see step 7, below. For details on configuring partners, see Resource Sharing Requests. For details on configuring rota templates, see Configuring Rota Templates.</td>
</tr>
<tr>
<td>Item creation location</td>
<td>Appears only when a non-NCIP partner is selected. The location in which the temporary item is to be created.</td>
</tr>
<tr>
<td>External identifier</td>
<td>The identifying string provided by the external system. The identifier is sent to the partner.</td>
</tr>
<tr>
<td></td>
<td>When an NCIP or ISO partner is selected, a value can be entered manually</td>
</tr>
<tr>
<td></td>
<td>When an ARTEmail partner is selected, a value is generated automatically. The format for this value is determined by the rs_external_id_prefix parameter. See Configuring Other Settings for details.</td>
</tr>
</tbody>
</table>

**Note**

- When creating a request from a citation, this value is pre-filled by the `citation_rs_default_owner` parameter; see Configuring Other Settings.
- If you select a requester assigned to a resource sharing library, the library appears in this field. If the requester is assigned to multiple resource sharing libraries, select one of them. If the user is not assigned to a resource sharing library, the Owner is the value configured in `ill_item_creation_lib_code` (see Configuring Other Settings). To assign a resource sharing library to a user, see Quick User Management Page Fields. You can create relationships between resource sharing libraries to enable the libraries to supply items for each other (see Configuring Fulfillment Services Between Libraries Within an Institution).

- 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.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field Description</td>
<td>This value corresponds to the External Identifier value when the request displays on the Resource Sharing Lending Requests Task List page (see Managing Resource Sharing Lending Requests).</td>
</tr>
<tr>
<td>Preferred send method</td>
<td>The preferred method of sending the item:</td>
</tr>
<tr>
<td></td>
<td>- Ariel</td>
</tr>
<tr>
<td></td>
<td>- Email</td>
</tr>
<tr>
<td></td>
<td>- Fax</td>
</tr>
<tr>
<td></td>
<td>- FTP</td>
</tr>
<tr>
<td></td>
<td>- Odyssey</td>
</tr>
<tr>
<td>Date Needed By</td>
<td>A date by which the item is required to be delivered</td>
</tr>
<tr>
<td>Delivery Location</td>
<td>Location to which to deliver the item. Appears when the ARTEmail partner of the request supports adding an address. Choose from:</td>
</tr>
<tr>
<td></td>
<td>- Deliver to library – Delivers to the library indicated in the Pickup at field.</td>
</tr>
<tr>
<td></td>
<td>- You can create relationships between libraries to enable the libraries to deliver items to each other (see Configuring Fulfillment Relationships).</td>
</tr>
<tr>
<td></td>
<td>- 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 is set to True on the Customer Parameters Mapping Table (see Configuring Other Settings).</td>
</tr>
<tr>
<td>Requested Pickup Location</td>
<td>The libraries appearing in this field are configured with the Deliver to option on the Organizational Units Relations Setup page (see Configuring Fulfillment Relationships). 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 Adding User Contact Information).</td>
</tr>
<tr>
<td>Note</td>
<td>When creating a request from a citation, this value is pre-filled by the citation_rs_default_requested_pickup_location parameter; see Configuring Other Settings. When pre-filled, For Reading-Room Use Only is selected by default.</td>
</tr>
<tr>
<td></td>
<td>This field is mandatory even when placing digital borrowing requests.</td>
</tr>
<tr>
<td>For Reading-Room Use Only</td>
<td>Whether to restrict access to a reading room. When selected, the field Actual Pickup Location appears and the received item is available from the actual location.</td>
</tr>
<tr>
<td>Note</td>
<td>When creating a request from a citation, Actual Pickup Location is pre-filled by the citation_rs_default_actual_pickup_location parameter; see Configuring Other Settings.</td>
</tr>
<tr>
<td></td>
<td>See the Restricting Resource Requests to a Reading Room video (2:02 mins) for details about library-level invoices.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Shipping cost</td>
<td>A shipping cost for the request. The 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).</td>
</tr>
<tr>
<td>Fund</td>
<td>The borrowing request can be assigned to a fund. Only funds associated with the Resource Sharing fund type are available as options to assign to a request. For more information, see Borrowing Requests Associated with Funds. Note: Currently, you must add the Fund-Ledger Viewer role to any operator who would like to use this feature. This will be fixed in an upcoming release.</td>
</tr>
<tr>
<td>Patron Request Cost</td>
<td>The patron request cost is the resource sharing request fee defined in the relevant policy (see Adding Fulfillment Policies). It may be overridden by changing the value at this point. The currency is the default currency of the institution. When a value is entered for this field, and subsequently paid, the field is disabled for further entry.</td>
</tr>
<tr>
<td>Patron Receive Cost</td>
<td>The patron receive cost is the resource sharing receive fee defined in the relevant policy (see Adding Fulfillment Policies). It may be overridden by changing the value at this point. The currency is the default currency of the institution. When a value is entered for this field, and subsequently paid, the field is disabled for further entry.</td>
</tr>
<tr>
<td>Alternative address</td>
<td>Appears 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.</td>
</tr>
<tr>
<td>Willing to pay</td>
<td>Whether the patron is willing to pay for the item</td>
</tr>
<tr>
<td>Agree to copyright</td>
<td>Select to indicate that the patron has agreed to the copyright terms.</td>
</tr>
<tr>
<td>Copyright terms</td>
<td></td>
</tr>
<tr>
<td>Needs patron</td>
<td>Whether more information on the patron is needed</td>
</tr>
<tr>
<td>Information</td>
<td></td>
</tr>
<tr>
<td>Request note</td>
<td>Enter any notes, as needed. When a request is submitted with a requested media type that was added to the out-of-the-box options (see Configuring Additional Requested Media) and the request is sent to an ISO partner, the partner receives the requested media information in this field.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>---------------</td>
<td>----------------------------------------------------------------</td>
</tr>
<tr>
<td>Requester Note</td>
<td>Any special note added by the requester.</td>
</tr>
<tr>
<td>Maximum Fee</td>
<td>The highest fine that the patron is willing to pay.</td>
</tr>
<tr>
<td>Level of Service</td>
<td>The requested shipping speed. To configure the available options, see Configuring Levels of Service.</td>
</tr>
</tbody>
</table>

For a description of the fields’ display in Primo, see Citation Linker.

3. 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).

4. To add partners to a request’s rota:
   1. Select Add Partners to add individual partners to the request's rota. The Resource Sharing Partner List page appears with the list of available resource sharing partners.

   ![Resource Sharing Partner List Page](image)

   2. Select the check box of the partner(s) to add to the request's rota, and select 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. Select 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.

5. To add rota templates: You can configure rotas to be used either in the order in which they are listed (Ordered) or in a random order (Non-ordered), using Fulfillment Configuration (see Configuring Rota Templates).
   1. Select Add Rotas to add rota templates to a request. The Rota Templates page appears with the list of
available rota templates.

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

6. Select Save to save the request with the selected parameters, or select Send to save the request with the selected parameters and send a message to the partner according to the selected parameters. If there are any blocks applied to this request, a window will display with the block(s) and the option to override, if applicable. If the block is overridden and the request saved, the Resource Sharing Borrowing Requests page displays the new item.

Note

- Send appears 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 Parameters of a Resource Sharing Library).

The item is added to the inventory in the default record format. To configure your system to support multiple record formats (such as UNIMARC), or to configure the default format, contact Ex Libris support.

- If a borrowing request is sent to an ISO or NCIP peer-to-peer lending partner that has inactivated their resource sharing library for lending, the status of the lending request will be set to Rejected the borrower request. The borrowing request will then have its status changed to Rejected by partner. For more information on inactivating a resource sharing library, see Configuring Parameters of a Resource Sharing Library.

- By default, an expired patron can create a borrowing request. This can be changed by setting the check_for_expired_account parameter to true. For more information, see Configuring Other Settings (User Management). When a request is created for the expired patron, an override warning is displayed to the user.

You may add additional information on the Resource Sharing Borrowing Request page, on the following tabs:

- Audit – see Viewing Borrowing Request Actions
- Rota – see step 3 in Editing a Borrowing Request
- Parameters – see step 4 in Editing a Borrowing Request
- Notes – see step 5 in Editing a Borrowing Request
- Attachments – see step 6 in Editing a Borrowing Request
Adding a Resource Sharing Borrowing Task From a Search

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

To add a resource sharing task from a search:


![Search Page: Add from Search](image)

2. Search for the item (see Searching in Alma).

Note

- You can select only All titles in the Find box.
- When adding a borrowing request from a search in the Network Zone, 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 select Select. The Request Attribute section on the Resource Sharing Borrowing Request page appears.

![Resource Sharing Borrowing Request Page – Request Attribute Section]

4. Enter or modify the request information, as described in the following table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requester</td>
<td>The patron requesting the title.</td>
</tr>
<tr>
<td>Request status</td>
<td>Select the status of the request. Choose from the following:</td>
</tr>
<tr>
<td></td>
<td>▪ Canceled by staff</td>
</tr>
<tr>
<td></td>
<td>▪ Created borrowing request</td>
</tr>
<tr>
<td></td>
<td>▪ Declared lost by partner</td>
</tr>
<tr>
<td></td>
<td>▪ Digitally received by library</td>
</tr>
<tr>
<td></td>
<td>▪ Expired</td>
</tr>
<tr>
<td></td>
<td>▪ Externally obtained</td>
</tr>
<tr>
<td></td>
<td>▪ Lender check in</td>
</tr>
<tr>
<td></td>
<td>▪ Loaned item to patron</td>
</tr>
<tr>
<td></td>
<td>▪ Locate failed</td>
</tr>
<tr>
<td></td>
<td>▪ Locate in process</td>
</tr>
<tr>
<td></td>
<td>▪ Mediated patron renewal</td>
</tr>
<tr>
<td></td>
<td>▪ Overdue request – The request’s due date arrived.</td>
</tr>
<tr>
<td></td>
<td>▪ Pending approval</td>
</tr>
<tr>
<td></td>
<td>▪ Physically received by library</td>
</tr>
<tr>
<td></td>
<td>▪ Ready to be sent</td>
</tr>
<tr>
<td></td>
<td>▪ Recalled by partner</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Requested format</td>
<td>Select the format of the request:</td>
</tr>
<tr>
<td></td>
<td>◦ Digital</td>
</tr>
<tr>
<td></td>
<td>◦ Physical</td>
</tr>
<tr>
<td></td>
<td>◦ Physical non-returnable</td>
</tr>
<tr>
<td>Requested media</td>
<td>The type of media in which you want the request to be supplied. The values that display in the drop-down field are those configured with a value of True on the Requested Media Definition Mapping Table page (see Configuring Requested Media Definitions). When a request is submitted with a requested media type that was added to the out-of-the-box options (see Configuring Additional Requested Media) and the request is sent to an ISO partner, the partner receives the requested media information in the Request Note field.</td>
</tr>
<tr>
<td>Allow other format</td>
<td>Select the check box to indicate that if the requested format is unavailable, the patron is willing to receive the item in another format.</td>
</tr>
<tr>
<td>Preferred send method</td>
<td>Select the preferred method of sending the item. Choose from the following options:</td>
</tr>
<tr>
<td></td>
<td>◦ Ariel</td>
</tr>
<tr>
<td></td>
<td>◦ Email</td>
</tr>
<tr>
<td></td>
<td>◦ Fax</td>
</tr>
<tr>
<td></td>
<td>◦ FTP</td>
</tr>
<tr>
<td></td>
<td>◦ Odyssey</td>
</tr>
<tr>
<td>Date needed by</td>
<td>Select the date on which the item is needed from the Calendar dialog box.</td>
</tr>
<tr>
<td>Delivery location</td>
<td>Location to which the item is to be delivered. Displayed when the ARTEmail partner of the request supports adding an address.</td>
</tr>
</tbody>
</table>

The value of this field is displayed as the **Request Status** on the Resource Sharing Borrowing Requests page.

Ex Libris, a ProQuest Company
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choose from:</td>
<td></td>
</tr>
<tr>
<td>◦ Deliver to library – Delivers to the library indicated in the <strong>Pickup at</strong> field. You can create relationships between libraries to enable the libraries to deliver items to each other (see Configuring Fulfillment Relationships).</td>
<td></td>
</tr>
<tr>
<td>◦ Alternative address – Delivers to the address indicated in the <strong>Alternative address</strong> field. If the Format value is <strong>Digital</strong>, this field contains an email address. The <strong>Alternative address</strong> option displays only if <code>rs_support_add_service</code> is set to True on the Customer Parameters Mapping Table (see Configuring Other Settings).</td>
<td></td>
</tr>
<tr>
<td>Requested pickup location</td>
<td>Select a location for the item to be picked up. The default value is the value selected in the Default Pickup Location field on the Organization Unit Details page (see Configuring Fulfillment Relationships). 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). 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 Adding User Contact Information). Note that this field is mandatory even when placing digital borrowing requests.</td>
</tr>
<tr>
<td>Copyright Status</td>
<td>Select a copyright status or select <strong>Calculate Copyright Status</strong> to the right of the drop-down list. Selecting <strong>Calculate Copyright Status</strong> automatically activates the digitization and copyright rules (see Configuring Digitization and Copyright Rules) and applies the calculated value to the request. The calculated value is overridden from this page. Note that the same digitization and copyright rules are also automatically applied when a digitally requested request is placed by Primo. In either case, if the rules determine that manual copyright approval is required, then the request cannot be sent to the lender. This Copyrights Status option appears only if <code>rs_borrower_copyright_management</code> is set to True on the Customer Parameters Mapping Table (see Configuring Other Settings). If the request is set to <strong>No copyright restriction</strong>, the request is sent with <strong>Copyright compliance</strong> set to US:CCL. If the request is set to <strong>Copyright approved</strong>, the request is sent with <strong>Copyright compliance</strong> set to US:CCG. A request that is set to <strong>Copyright not approved</strong> cannot be sent. This field is applicable only to requests that are requested in digital format.</td>
</tr>
<tr>
<td>Shipping cost</td>
<td>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).</td>
</tr>
<tr>
<td>Fund</td>
<td>The borrowing request can be assigned to an acquisition fund. Only active Resource Sharing funds that are allowed for use by the active resource sharing library will be available as options. For more information, see Assigning Borrowing Requests to Funds.</td>
</tr>
<tr>
<td>Willing to pay</td>
<td>Select to indicate that the patron is willing to pay for the item.</td>
</tr>
<tr>
<td>Agree to</td>
<td>Select to indicate that the patron has agreed to the copyright terms.</td>
</tr>
</tbody>
</table>
### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>copyright terms</td>
<td></td>
</tr>
<tr>
<td>Needs patron information</td>
<td>Select to indicate that more information on the patron is needed.</td>
</tr>
<tr>
<td>Request note</td>
<td>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:</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Maximum fee</td>
<td>The maximum fee that the borrowing patron is willing to pay for the item.</td>
</tr>
</tbody>
</table>

5. Select **Add Partners** to add a partner to the request's rota. See step 6 in [Manually Adding a Request](#).

6. Select **Add Rotas** to add a rota template (group of partners). See step 7 in [Manually Adding a Request](#).

7. Select **Save**. If there are any blocks applied to this request, a window will display with the block(s) and the option to override, if applicable. If the block is overridden and the request saved, the resource sharing task is saved and displayed on the Resource Sharing Borrowing Requests page.

**Note**

If a borrowing request is sent to an ISO or NCIP peer-to-peer lending partner that has inactivated their resource sharing library for lending, the status of the lending request will be set to **Rejected the borrower request**. The borrowing request will then have its status changed to **Rejected by partner**. For more information on inactivating a resource sharing library, see [Configuring Parameters of a Resource Sharing Library](#).

---

### Adding a Request From an External Resource

You can create a borrowing request for a resource that is cataloged in an external system (that is, outside of Alma and the current institution). Using this feature, operators can use existing records to describe the required resource by using a catalog record or another institution, instead of having to manually type in the request's description. You can search for resources using an external search profile.

For more information about adding a request from an external resource, see the [Creating a Borrowing Request Using External Resources](#) video (3:41 mins).

**To create a resource sharing borrowing request from an external search:**

![External Resource Search Page](image)

2. In the Find field, enter search criteria.

Search may be performed with an exact phrase, keywords, or starts with text. In addition to searching all fields, ISBN and ISSN may also be searched separately.

For more information about adding from an external search, see the New Options for Add from External Search video (1:00 min).

3. In the In profile field, select the external profile by which the criteria is to be searched.

   **Note**

   The displayed list of profiles includes the external search profiles configured on the External Search Profile List page; see Configuring External Search Profiles.

4. Select Go. The search results display on the page.

![External Resource Search Page – Search Results](image)

5. Select the resource from which you want to create a borrowing request and select Select. The Resource Sharing Borrowing Request page opens.

6. Configure the fields on both the General Information and Parameters tabs, as you would for any other resource sharing borrowing request, and select Save. If there are any blocks applied to this request, a window will display with the block(s) and the option to override, if applicable. If the block is overridden and the request saved, the resource sharing task is saved and displayed on the Resource Sharing Borrowing Requests page.
Note

If a borrowing request is sent to an ISO or NCIP peer-to-peer lending partner that has inactivated their resource sharing library for lending, the status of the lending request will be set to **Rejected the borrower request.** The borrowing request will then have its status changed to **Rejected by partner.** For more information on inactivating a resource sharing library, see [Configuring Parameters of a Resource Sharing Library](#).
Editing a Borrowing Request

You can edit the parameters configured for a borrowing request.

To edit a borrowing request:


2. Modify the fields as needed. For a description of the fields, see the Resource Information Fields table in Adding a New Book or Journal Article and Request Attribute Field table in Creating a Borrowing Request.

3. To manage partners in a request's rota:
   1. Select the **Rota** tab. The Rota page displays, showing the list of partners in the current rota.

   ![Rota Tab Page]

   2. Select **Add Partners**. Select Select from a list. The Resource Sharing Partner List page opens, displaying the list of available Resource Sharing Partners.
3. Select the check box of the partners you want to add to the rota and select Select. The selected partners are listed in the Partner field.

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

---

**Note**

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

---

5. 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 select Move selected.
   - A partner in the rota may be repositioned from being a pending partner to being the active partner by using the sort arrows while the request is in Created Borrowing Request or Ready to Be Sent statuses. Under all other circumstances, rota partners must be in a Pending status to be repositioned.

6. To delete a rota partner, select Remove from the row actions list for the relevant partner.

7. To cancel a rota’s active partner, select Cancel from the row actions list for the active rota. Partners can be canceled only if canceling is enabled in the partner’s workflow profile. There is also an option on the drop-down list at the top of the borrowing request (to the left of the Go button), Cancel Active Partner, that will also cancel the active partner, send a cancelation message to the partner, and activate the next partner on the rota, if available.

---

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).

5. On the Notes tab, add and edit notes as needed. For more information about this tab, see Notes 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. For more information about this tab, see [Attachments Tab](#).

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

7. Select **Save** to save your changes.
Sending a Borrowing Request

Sending a Request for an ARTEmail or ISO partner

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

![Resource Sharing Borrowing Parameters Page](image)

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

   The service codes and query codes displayed depend on those configured in Fulfillment Configuration when configuring Resource Sharing Partners (see Resource Sharing Partners). 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. Select **Save** to save the request with the selected parameters, or select **Send** to save the request with the selected parameters and send the request to the ARTEmail or ISO partner.

Sending a Request for a CCC GetItNow Resource

You can use the CCC GetItNow service in a mediated manner, if you do not want to have this as an open service to all patrons.

**To utilize the CCC GetItNow service:**

1. Activate the relevant CCC GetItNow electronic collection that is managed in the Community Zone.
2. Create a new resource sharing partner for the CCC GetItNow Service.
3. Create a resource sharing borrowing request with the CCC GetItNow service selected as the partner. From the
electronic portfolio, access the CCC GetItNow link in a browser and submit the article request.

4. Once CCC GetItNow sends the article's access link, copy the link into the externally obtained dialog box to send an email to the patron with the link to the article.

To suppress it from the View It tab and make it available only to resource sharing staff, the collection may be activated without externalizing its availability. For more information, see Adding a Local Electronic Collection in the .

For more information on configuring the CCC GetItNow partner, see Resource Sharing Requests in the Alma Integrations with External Systems Guide.

To send a request using the GetItNow service:

1. Create a borrowing request.

   **Note**
   There are six required fields for the GetItNow service: Article/Chapter Title, Journal Title, Volume, Issue, Start Page, and Publication Date.

Select Add partners and select a partner with a profile type External System.

2. Select Send for the request. The electronic portfolio page appears.
3. Select **Link to Service** to display information about the article. The operator uses the CCC interface to request the article.

![Article Information]

This article will be emailed to you within 8 hours (normal delivery time is under 2 hours) once you enter a valid email address, review, and accept the terms below.

**Email Address**

(Enter email address for delivery of article)

**Terms and Conditions**

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4. On returning to the resource sharing task list, a new action is available, **Externally Obtained**. Select this link to display a send email window. Enter the URL supplied by the GetItNow service in this window, and send the URL to the requesting patron.

![Externally Obtained]

[ ] Requester

[ ] URL

[ ] Send email

[ ] Requester email

[ ] Note to patron

[ ] Internal note

[ ] Complete

[ ] Cancel  [ ] OK
5. Selecting the **Complete** box marks the request as **Completed** once you select **OK** to send this email to the patron. A sample of the Externally Obtained Email Letter follows.

![Resource Obtained Notification]

**Patron Notification Email**

For more information on configuring letters, see [Configuring Alma Letters](#).

For more information on requesting a CCC GetItNow resource, see the [Support for CCC GetItNow Service in Resource Sharing](#) video (4:05).
Borrowing Requests Associated with Funds

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)

Resource sharing borrowing requests can be assigned to a fund. See [Manually Adding a Borrowing Request](#).

To do this:

- The ResourceSharing fund type must be active. See [Configuring Fund Types](#).
- At least one fund must be associated with the fund type (see [Adding a Fund](#)).

When a borrowing request has a shipping cost (other costs, such as request or receipt fees are applied to the user) and an associated fund, a transaction is created in the fund as an encumbrance. If the request is deleted, the encumbrance is deleted as well. When the item is received, the transaction is updated as an expenditure. Fund managers can view the borrowing request from the fund transactions list. When doing so, the requester information is hidden.

You must run the Rollover Resource Sharing Requests job once a year to reallocate requests with open encumbrances to new funds. See [Rolling Over Resource Sharing Requests](#).
Managing Borrowing Renewals

Borrowing renewals may be requested through various channels. The renew action may be done manually or automatically. It may be triggered by a patron request or a staff request on behalf of a patron.

1. A renewal request is created. The patron may request the renewal directly in Primo or it may be created by an operator in Alma by selecting Request Renew for the borrowing request. Depending on the configuration, a patron request may be transmitted directly to the lender or it may require mediated renewal by borrowing library staff. A mediated renewal will display the status of Mediated Patron Renewal while it is waiting for operator review. Once requests are sent to the lending institution, the request status is set to Renew Requested.

2. The renewal request is transmitted automatically either via an ISO message or an email to the lending institution. The email letter is Ful Renew Email Letter.

3. Depending upon configuration, Alma determines whether to automatically renew the request. For details on configuring, see Configuring Workflow Profiles. During automatic renewal, Alma checks if there are any open requests for the title. If there is a request on the specific item, the renewal request is always rejected. If there is a request at the title level, the renewal is determined by the value in the Not Renewable - Item has Request(s) parameter in Block Preferences (see Configuring Block Preferences). If the parameter is set to Handle Automatically, the renewal will be automatically accepted. If the parameter is set to another value the renewal will be automatically rejected.

4. If a manual response is required, the operator selects the Renew button. The status is changed to Renewed by Partner. For more information, see Managing Resource Sharing Borrowing Requests.

5. If the request is renewed, a message is sent to the patron and a renewal fee may be charged. The letter is the Ful Borrowing Info letter. To configure the letter, see Configuring Alma Letters. A resource sharing renew fee is set as part of a fulfillment policy; see Adding Fulfillment Policies. If the request is rejected by the lender manually through an email, the operator sets the request status to Renew Request Not Accepted. If the renewal or rejection is automatic,
all statuses are changed as the system receives the response from the lender. If the lender approved the renewal request but the renewal failed on the borrower side, an active note and a history message (visible in the Audit tab) are added to the request.

For more information, see More Information About Resource Sharing Renewals and the Resource Sharing Renewals Demo video (25:53 min)
Managing Resource Sharing Lending Requests

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)

1. Create a lending request, either manually (see Adding a Resource Sharing Lending Task Manually) or using search (see Adding a Resource Sharing Lending Task From a Search).

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

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

4. Shipping the resources (see Shipping Lending Request Resources), as follows:
   1. **Physical** or **Physical Non-Returnable Items** – Send to resource sharing desk
   2. **Digital Items** – Send by 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 Lending Request Resources.

After you scan an item into Alma, if the borrowing institution is an ISO partner, an ISO checked-in message is sent to the 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). If the borrowing institution is an email partner, the Lender Checked-In Email Letter is sent. For information about this letter, see Configuring Alma Letters.

If a lending request is overdue, you can send a message to the borrower institution requesting to return it. The email / ISO message to send in this case is the Borrower Overdue Email Letter, see Alma Letters List. This message is sent by the Send Overdue Message to Resource Sharing Borrowing Partner scheduled job. Alternatively, you can manually send a general message to the partner.

Workflow Actions

[Image: Resource Sharing Lending Requests Task List Page]
The Fulfillment Services Operator manages the pool of resource sharing lending requests on the Resource Sharing Lending Requests Task List page (Fulfillment > Resource Sharing > Lending Requests). You can also view this page, on a pre-selected tab and with the requests pre-filtered, by selecting one of the following links in the Tasks List in the persistent menu (see The Persistent Menu and Tasks in the Task List):

- Lending requests - New - assigned to you
- Lending requests - New - unassigned
- Lending requests - Overdue - assigned to you - Pre-filters for requests with the status Overdue Request
- Lending requests - Overdue - unassigned
- Lending requests - Recalled - assigned to you - Pre-filters for requests with the status Recalled Item
- Lending requests - Recalled - unassigned
- Lending requests failed locate - assigned to you - Pre-filters for requests with the status Locate Failed
- Lending requests failed locate - unassigned
- Lending requests with active general messages - assigned to you - Pre-filters for requests that have a general message
- Lending requests with active general messages - unassigned
- Lending requests with active notes - assigned to you - Pre-filters for requests that have a request note
- Lending requests with active notes - unassigned

This page presents a record list of resources associated with lending requests. Each item presents details about the resource and the request, as well as tabs containing additional information:

- Alerts - Alerts about the request. A green dot in the tab header indicates that at least one alert exists.
- Physical, Electronic, Digital - See Viewing Inventory/Other Details.
- Other details - Additional information from the bibliographic record.

To manage the lending resource sharing tasks:

1. On the Resource Sharing Lending Requests Task List page, filter results using the Activity Status filter at the top of the page, where you can select to view All, Active, or Completed requests. If you select All or Completed, the task list remains empty until you enter a search term in the Find box for one or more specific requests.

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

   - Status – Status of the lending request.
     The following statuses that indicate the final step in the request is done (final statuses) and the requests may be removed:
       - Shipped digitally
       - Request completed - This is the final status before removal, and may be manually set.
     Non-final (intermediate) statuses in the request process are shown below:
       - Being Processed
       - Borrower Recall
       - Cancel Reply
       - Cancelled
       - Conditional
- Created lending request
- Damaged
- Expired
- Lender check in
- Locate failed
- Lost
- Non expiring
- Overdue request
- Pending auto reject
- Recalled item
- Received by partner
- Rejected the borrower request
- Renew requested
- Returned by partner
- Shipped physically
- Will supply
- Staff renewal
- Renewal response
- Patron renewal

- Request Printed – Requests that have had a print slip printed
- Request Reported – Requests that have been printed on the print slip report
- Active Partner – The active partner in a request rota
- Creation Date – Date on which request was created. Possible values are:
  - Today – Requests created on current date
  - Yesterday – Requests created on day before current date
  - Up to three days ago – Requests created two or three days before current date (excluding today and yesterday)
  - Up to a week ago – Requests created between four to seven days before current date (excluding the above three options)
  - Up to a month ago – Requests created between eight days and a month before current date (excluding the above four options)
  - Older – Requests created more than one month before current date
- Update Date – Date on which the request was updated. Possible values are the same as those for the Creation Date facet.
- Requested Format – The format of the requested item. Options are: Digital, Physical, and Physical non-returnable
- Supplied Format – The format in which the requested item was supplied. Options are: Digital, Physical, Physical non-returnable and Undefined
- Due Date – The date by which the item must be delivered. Possible values are the same as those for the Creation Date facet.
- **Last Interest Date** – The date after which the requester has indicated that they are no longer interested in the item
- **Owning Library** – The library which owns the requested resource
- **Level of Service** – The level of service assigned to the request.

3. Select one of the following tabs:
   - **Assigned to Me** – Displays resource sharing tasks that are assigned to the user that is logged in.
   - **Unassigned** – Displays resource sharing tasks that are unassigned.
   - **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.

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**Note**

These tabs include an indicator that turns blue when requests are available for that tab.

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**Note**

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

---

4. 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 using 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](#)) or from a search (see [Adding a Resource Sharing Lending Task From a Search](#)).

   For more information about using the find box, see the [Enhanced Search Options in Resource Sharing](#) video (1:32 mins).

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

- **Change Status** – Change the status of the specified items. Select a status from the drop-down list and select **Change Status**.

- **Print Slip Report** – Print a slip report that is sent to a printer or email address, or can be downloaded to a local machine (see the procedure below.). The report contains the items and their information, including Title, Author, Location, and so forth. The letter format for this report is the Lending Requests Report Slip Letter.

   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** – Print a call slip for each of the selected items. The Ful Incoming Slip Letter, also known as the resource sharing lending slip letter, is the letter that is printed. For information about the slip, see [Configuring Alma Letters](#).

- **Remove Requests** – Remove requests associated with the items. Select **Confirm** in the Confirmation Message dialog box to remove the requests.

- **Remove Alerts** – Remove alerts associated with the items. Select **Confirm** in the Confirmation Message dialog box to remove the alerts.

To manage a specific task, select one of the links beneath the relevant task, as described in the following table:
<table>
<thead>
<tr>
<th>Link</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Edit</strong></td>
<td>Available in the Assigned and Unassigned tabs. Selecting <strong>Edit</strong> for an unassigned task locks the task for editing by other operators. Edit the resource sharing task. For a list of fields displayed on this page, see Resource Information Fields table and Request Attribute Fields table.</td>
</tr>
<tr>
<td><strong>View</strong></td>
<td>View the lending request. The view link appears when a record is inactive or the user has view permission for the lending requests.</td>
</tr>
<tr>
<td><strong>Manage fulfillment options</strong></td>
<td>The Fulfillment Services Operator performs internal library procedures which makes the resource requested by the resource sharing library available (see Managing Fulfillment Options).</td>
</tr>
<tr>
<td><strong>Note</strong></td>
<td>Assign an unassigned request to the current user.</td>
</tr>
<tr>
<td><strong>Remove</strong></td>
<td>Remove the request from the system.</td>
</tr>
</tbody>
</table>
| **Duplicate**     | Create 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 Request Attribute Fields table). 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**      | Reassign a task to another user (see Reassigning a Task).                                                                                                                                                   |
| **Detach from MMS** | Detach a lending request from its inventory (see below To detach a resource sharing lending request from inventory).                                                                                           |
| **Checked In**    | Send 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).                                             |
| **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.  
  When multiple resources are found, the results display on the search page, where you can either select a result or select the **Change Query** link to modify the search value.  
  It is recommended to select **Edit** for a resource and update relevant information before selecting **Locate**. When a resource is located, the status changes to **Resource Located**. |
<p>| <strong>Search</strong>        | Displayed for items for which <strong>Resource Locate Status = No Resources Located</strong>. Opens the search page, which enables performing a new resource search to locate the resource.                                              |</p>
<table>
<thead>
<tr>
<th>Link</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reactivate Request</td>
<td>Appears only when <strong>Reactivated</strong> is enabled in the borrowing workflow profile. See Adding Workflow Profiles. Select this option to reactivate a completed peer to peer resource sharing request. The shipped item's process status is set to <strong>In resource sharing</strong> and the item is relinked. The request status is <strong>Request Reactivated</strong>. If the item is in another process, an error is displayed. The request's original external ID is maintained. This action is available for Fulfillment Services Managers, and may be turned on for Fulfillment Services Operators by Ex Libris customer support.</td>
</tr>
<tr>
<td>Reject</td>
<td>Reject a lending request (see Rejecting a Lending Request).</td>
</tr>
<tr>
<td>Release assign (on the Assigned to Me tab)</td>
<td>Move the task from the <strong>Assigned to Me</strong> tab to the <strong>Unassigned</strong> tab.</td>
</tr>
</tbody>
</table>
| Renew | For automated requests (ISO, NCIP, etc.), this action will also appear if the **Request Status** is **Renew Requested** and the 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.)  
For non-automated requests, when **Request Status** is **Received by Partner** and **Manual renew** is selected as a step in the workflow profile, the action is available.  
Select the option to open the **Due Date** dialog box. Enter a due date and select **OK** to create the renewal.  
Optionally, you can add an Internal note and/or a Note to partner in the relevant fields. For details on these fields, see step 3 in Rejecting a Borrowing Request. |
| Print slip | Print a call slip for the item, containing both the external ID and barcode of the item.  
For requests that have not yet been shipped, this option prints an incoming request slip, Ful Incoming Slip Letter. For requests that have already been shipped, this option prints a shipping slip, Resource Sharing Shipping Slip Letter, containing additional information specific to the item being shipped.  
For information on these slips, see Configuring Alma Letters. |
| Ship non-returnable | Ship 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 Digitally | Add files to the lending request that are already in your possession (i.e. have not been created as part of a digitization workflow). Once the files are uploaded and the page saved, the request is changed either to **Shipped Digitally** or **Request Completed** depending on whether the **Complete the request** check box is selected on the Shipping Digitally page. |
| Ship item | Ship the item associated with the request. The Shipping Items page opens (see Shipping Items). |
| General Message | Send a general message with a lending request to a borrower (see Sending a General Message With a Resource Sharing Request). |
| Status Query | Request a status update from the borrowing institution. This is only applicable to ISO partners. |
The returned lender ISO status is recorded in a note. Each ISO status corresponds to the following Alma request statuses:

- Not supplied - Rejected the borrower request, Locate failed, Expired
- Pending - Created lending request, Being processed, Will Supply, Non expiring
- In Process - Staff renewal, Renewal response
- Cancel Pending - Cancel reply
- Canceled - Canceled
- Shipped - Shipped Physically, Shipped Digitally
- Received - Received by partner
- Renew Pending - Renew requested, Patron renewal
- Overdue - Overdue request
- Returned - Returned by partner
- Checked In - Lender check in, Request Completed
- Recall - Recalled item
- Lost - Lost
- Unknown - Damaged, all other

<table>
<thead>
<tr>
<th>Link</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Will Supply</td>
<td>Update a request that has not yet shipped with a Will Supply status. Displayed only when the request is not yet shipped and the borrowing partner’s workflow includes Will Supply (see Configuring Workflow Profiles).</td>
</tr>
<tr>
<td>Conditional</td>
<td>A pop-up window is displayed with a mandatory Reason, a Date for reply, which is the last day the lender will wait to receive an answer from the borrower, and a Note field. When the message is submitted, the request status changes to Conditional. An ISO message is sent to the borrower. When a response is received from the borrower, if the response value is No, the request is rejected. If the value is Yes, the Date for Reply field is cleared and the request status returns to Created lending request.</td>
</tr>
<tr>
<td>More details</td>
<td>Open a pop-up window displaying additional details about the request that are not displayed in the request's listing on the Resource Sharing Lending Requests Task List page.</td>
</tr>
</tbody>
</table>

**Note**

- If a request is processed automatically (by 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.
- During the creation of the lending request, if a title has more than one item, the availability and requestability are not checked during the locate process. The request should be handled manually.

**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. Select Detach from MMS from the row actions list. 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 appears at the top of the page.

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

![Print Slip Report Dialog Box](image)

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 by email. The letter format for this report is the Lending Requests Report Slip Letter.

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

5. Select Send to send the print slip report, or optionally, select Download to download the print slip report to your local machine.

Removing Alerts

Alerts are attached to a resource sharing task during the main steps of a request's workflow. The alerts show the progress of the request (in Process, Canceled, or Completed). The alerts are:

- Citation Move Request in Process
- Citation Move Request Canceled
- Citation Move Request Completed
- Citation Digitization Request in Process
- Citation Digitization Request Canceled
- Citation Digitization Request Completed

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. Select Remove Alerts.

3. Select 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), select Reassign from the row actions list for the relevant task. The Assign To dialog box opens.
2. From the Assign to drop-down list, select an operator.
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. Select Assign To.

Viewing Lending Request Actions

You can view the actions taken on resource sharing lending requests on the History tab, in the same manner that you do for resource sharing borrowing requests. For details, see Viewing Borrowing Request Actions.

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:

On the Resource Sharing Lending Requests Task List page (Fulfillment > Resource Sharing > Lending Requests), select Manage fulfillment options from the row actions list. The Manage Resource Options page opens.
Select from the relevant service type on the Manage Resource Options page, as follows:

- **Electronic Services** — Select 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 select Submit. The submitted request is displayed on the Manage Resource Options page.

- **Digital Services** — Displays the preservation type, revision number, and number of files for digital services. You can select Document Delivery and then select Attach to attach the resource to an email and send it digitally.

- **Physical Services** — Select View items from the row actions list to view items for the resource (see [Working with the...](#))

**Note**

Selecting the Manage fulfillment options link assigns an unassigned request to the current user, even when selecting Cancel to exit the Manage Resource Options page without performing an action.
List of Items. Select Request from the row actions list to create a request for the resource (see Creating a Request).

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 selecting the displayed buttons on the Manage Resource Options page:

- **Remove Alerts** – Removes alerts for the request (see Removing Alerts)
- **Place Request** – Opens the Create Request page, where you select whether to ship the item digitally or physically (see Placing Requests)

---

**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, select **Place Request**. The Create Request page opens.
2. In the Request type field, select **Ship digitally** or **Ship physically**, as needed. The Create Request page refreshes accordingly:
   - **Ship digitally:**
3. Configure the displayed fields, as described in the following table:
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year (for journal requests)</td>
<td>Year of the request</td>
</tr>
<tr>
<td>Volume (for journal requests)</td>
<td>Volume of the request</td>
</tr>
<tr>
<td>Description (for journal requests)</td>
<td>Description of the request</td>
</tr>
<tr>
<td>Note</td>
<td>The following fields are added in the note:</td>
</tr>
<tr>
<td></td>
<td>◦ Article/Chapter Title</td>
</tr>
<tr>
<td></td>
<td>◦ Volume</td>
</tr>
<tr>
<td></td>
<td>◦ Issue</td>
</tr>
<tr>
<td></td>
<td>◦ Chapter</td>
</tr>
<tr>
<td></td>
<td>◦ Pages</td>
</tr>
<tr>
<td></td>
<td>◦ Year</td>
</tr>
<tr>
<td></td>
<td>◦ Note</td>
</tr>
<tr>
<td></td>
<td>Free-form notes may also be entered as needed.</td>
</tr>
<tr>
<td>To (for physical requests)</td>
<td>Select the specific library location (from a list predefined by an administrator) to which you want to move the item</td>
</tr>
<tr>
<td>Destination Locations (for physical requests)</td>
<td>Where to deliver the copies</td>
</tr>
<tr>
<td>Call Number Type (for physical requests)</td>
<td>See call_number_type in Configuring Other Settings.</td>
</tr>
<tr>
<td>Call Number (for physical requests)</td>
<td>The call number</td>
</tr>
<tr>
<td>Managing Department (for digital requests)</td>
<td>Select the digitization department from the drop-down list</td>
</tr>
<tr>
<td>Number of Students (for digital requests)</td>
<td>The number of students</td>
</tr>
<tr>
<td>Number of Copies for Students (for digital requests)</td>
<td>The number of student copies requested</td>
</tr>
<tr>
<td>Number of Copies for Staff (for digital requests)</td>
<td>The number of staff copies requested</td>
</tr>
<tr>
<td>Resource Total Pages (for digital requests)</td>
<td>Total pages in the requested item</td>
</tr>
<tr>
<td>Required Chapters (for digital requests)</td>
<td>Chapters needed for the request</td>
</tr>
<tr>
<td>Total Chapters Count (for digital requests)</td>
<td>Total chapters in the requested item</td>
</tr>
<tr>
<td>Required Pages (From/To) (for digital requests)</td>
<td>The From and To pages that will be digitized</td>
</tr>
<tr>
<td>Total Required Pages (for digital requests)</td>
<td>The pages entered above are automatically calculated for a total of pages</td>
</tr>
<tr>
<td>Includes Image(s) (for digital requests)</td>
<td>Whether the pages to digitize include images</td>
</tr>
</tbody>
</table>
### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Available From (for digital requests)</td>
<td>The start date for which any copies will be made available</td>
</tr>
<tr>
<td>Date Available To (for digital requests)</td>
<td>The end date for which any copies will be made available</td>
</tr>
<tr>
<td>Note 1 (for digital requests)</td>
<td>Private notes, if any</td>
</tr>
<tr>
<td>Note 2 (for digital requests)</td>
<td>Private notes, if any</td>
</tr>
<tr>
<td>Note 3 (for digital requests)</td>
<td>Private notes, if any</td>
</tr>
<tr>
<td>Material Type (for digital requests)</td>
<td>Select the desired material type from the available types</td>
</tr>
<tr>
<td>Date Needed By (for digital requests)</td>
<td>Select the date that the request is needed</td>
</tr>
</tbody>
</table>

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

---

## 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.

The `rs_keep_rejected_request_active` customer parameter determines if a request stays in an active status even after it is rejected. When the parameter is set to **None**, which is the default, the request will be completed and will not be visible in the active requests queue. When the parameter is set to **Lending** or **Both**, the request will remain in the active requests queue so the staff librarian will have the option to work on the request. This functionality applies only to rejections that occur after the parameter is changed. For more information, see **Configuring Other Settings (Fulfillment)**.

### To reject a lending request:

2. Select a reason for the rejection in the **Reject reason** field.
3. Optionally, add a note for the rejection in the **Internal note** and **Note to Partner** fields.
4. Select **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**). If no partner is found, the request's citation status changes to **Rejected the borrower request**, and the **Reject reason** and **Internal note** are displayed in the Notes tab for the request (select 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**). If the borrowing institution is an email partner, the **Lender Reject Email Letter** is sent to the partner.

---

## Shipping 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. Shipping may be done from the Shipping Items page, **Fulfillment > Resource Sharing > Shipping Items**, (see **Shipping Items**), which is the recommended shipping interface, or from the Scan In Items page, **Fulfillment > Resource Requests > Scan In Items**, (see Library/Desk Selector in **The Persistent Menu**). Ensure that you are at a resource sharing library.

2. For shipping from the Scan In Items page, in the **External Identifier** field, select **Yes**.

---

**Note**

The Automatic Print Slip option is not functional when shipping from the Scan In interface.

---

3. For shipping from the Shipping Items page, select a lending request on the Resource Sharing Lending Requests Task List and select **Ship Item** from the row actions list.

4. Scan an item barcode and a request ID of the resource sharing item in the relevant fields.

5. Select **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 is sent to the borrowing partner. When the borrowing institution is an email partner, the Lender Ship Email Letter is sent. When the borrowing institution is an ISO partner, the ISO **Ship** message is sent to the partner.

---

**Digitally Shipping Lending Request Items**

You can ship digital items that are already in your possession to the borrowing institution or directly to the requester.

**To digitally ship resource sharing lending request items:**

1. From the lending request, select **Ship Item Digitally** from the row actions menu.

2. Enter the applicable shipping notes.

3. Select **Complete the request** to mark the request status as **Request Completed** when the item is sent.

4. Select **Add File** from the **File Upload** section and select the file from your file upload browser.

5. Select **OK** to send the file.

When the file is sent this way, it is not stored or displayed in the Manage Fulfillment Options page. Note that only one file can be shipped. If you need to ship multiple files, you will first have to zip them into one file.

It is also possible to to ship digital resources that are managed in Alma, regardless of whether the digital content is stored remotely (using a Remote Representation) or locally on Alma. On the Manage Resource Fulfillment Options page (Digital Services section), the following actions are available if there are Alma managed digital resources for the requested title:

1. **View** - View the digital representation. If the representation is a Remote Representation, you can also use a **Ship** action to ship the digital content.

2. **View Files** (if the representation is not a remote representation) - Choose one or more files to ship, if they are stored locally on Alma.

3. **Deliver** - View the files.
Creating a Lending Request

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), select Actions > 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:

   ![Resource Sharing Lending Request Page – Book]

   ◦ Article – The following page opens:
2. In the Resource Information area, enter information in the relevant fields, as described in Resource Information Fields.

3. In the Request Attribute area, enter information in the relevant fields, as described in Request Attribute Fields.

4. Select Save. If there are any blocks applied to this request, a window will display with the block(s) and the option to override, if applicable. If the block is overridden and the request saved, the Resource Sharing Lending Requests page displays the new item.

---

**Note**

If your resource sharing library has been inactivated for lending and a request is sent by an ISO or NCIP peer-to-peer borrowing partner, the status of the lending request will be set to **Rejected the borrower request**. The borrowing request will then have its status changed to **Rejected by partner**. For more information on inactivating a resource sharing library, see Configuring Parameters of a Resource Sharing Library.

---

**Adding a Resource Sharing Lending Task From a Search**

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

To add a resource sharing task from a search:

2. Search for the item; see Searching in Alma.

You can select only All titles or Physical titles. When adding a request from a search in the Network Zone, 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 select Select. The Request Attribute section on the Resource Sharing Lending Request page opens.

4. Enter or modify the request information, as described in the following table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplied to (Required)</td>
<td>Select the specific integration profile, configured on the Resource Sharing Partner List page in Fulfillment Configuration (see Resource Sharing Partners).</td>
</tr>
<tr>
<td>Owner</td>
<td>Select the resource sharing library that the operator is scoped to. If the request is created automatically, as with an NCIP message, the owner is set by the NCIP partner's parameters. For an ISO message, the value is set to the ISO symbol configured in the resource sharing library.</td>
</tr>
<tr>
<td>Request status</td>
<td>Select the status of the request. Choose from the following:</td>
</tr>
<tr>
<td></td>
<td>◦ Being processed</td>
</tr>
<tr>
<td></td>
<td>◦ Cancel reply</td>
</tr>
<tr>
<td></td>
<td>◦ Created lending request</td>
</tr>
<tr>
<td></td>
<td>◦ Damaged</td>
</tr>
<tr>
<td></td>
<td>◦ Expired</td>
</tr>
<tr>
<td></td>
<td>◦ Lender check in</td>
</tr>
<tr>
<td></td>
<td>◦ Locate failed</td>
</tr>
<tr>
<td></td>
<td>◦ Lost</td>
</tr>
<tr>
<td></td>
<td>◦ Overdue request – The request's due date arrived.</td>
</tr>
<tr>
<td></td>
<td>◦ Received by partner</td>
</tr>
<tr>
<td></td>
<td>◦ Rejected the borrower request</td>
</tr>
<tr>
<td></td>
<td>◦ Request completed – The request was delivered or it was canceled before it reached the hold shelf.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>◦ Returned by partner</td>
<td></td>
</tr>
<tr>
<td>◦ Shipped digitally</td>
<td></td>
</tr>
<tr>
<td>◦ Shipped physically</td>
<td></td>
</tr>
<tr>
<td>◦ Will supply</td>
<td>The value of this field is displayed as the Citation Status on the Resource Sharing Lending Requests Task List page.</td>
</tr>
<tr>
<td>External identifier (Required)</td>
<td>Enter the identifying string supplied by the external system.</td>
</tr>
<tr>
<td>Format</td>
<td>In the Format drop-down list, select the format of the request:</td>
</tr>
<tr>
<td>◦ Digital</td>
<td></td>
</tr>
<tr>
<td>◦ Physical</td>
<td></td>
</tr>
<tr>
<td>◦ Physical non-returnable</td>
<td></td>
</tr>
<tr>
<td>Requested media</td>
<td>The type of media in which you want the request to be supplied. The values that display in the drop-down field are those configured with a value of True on the Requested Media Definition Mapping Table page (see Configuring Requested Media Definitions).</td>
</tr>
<tr>
<td></td>
<td>When a request is submitted with a requested media type that was added to the out-of-the-box options (see Configuring Additional Requested Media) and the request is sent to an ISO partner, the partner receives the requested media information in the Request Note field.</td>
</tr>
<tr>
<td>Allow Other Format</td>
<td>If the requested format is unavailable, this indicates whether the patron is willing to receive the item in another format.</td>
</tr>
<tr>
<td>Language</td>
<td>This is the language that is requested by the patron in the borrowing request.</td>
</tr>
<tr>
<td>Copyright Status</td>
<td>Reflects the borrower side copyright status (if the borrower support copyright statuses). The borrower value will be automatically populated for ISO requests.</td>
</tr>
<tr>
<td>Shipping cost</td>
<td>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).</td>
</tr>
<tr>
<td>Date needed by</td>
<td>Select the date on which the item is needed from the Calendar dialog box.</td>
</tr>
<tr>
<td>Request note</td>
<td>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:</td>
</tr>
<tr>
<td>Requester email</td>
<td>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 Borrowing Request). The document is delivered to this email.</td>
</tr>
</tbody>
</table>
5. To assign notes as active or to dismiss displayed notes for a request, select the relevant option in the drop-down at the top of the page (Activate Notes or Dismiss Notes) and select Go. Notes received from a peer member are automatically labeled as Active. Dismissed notes are excluded from the Active Notes facet of the Task List, but are still included with their respective requests (they are not deleted).

6. Select Save. If there are any blocks applied to this request, a window will display with the block(s) and the option to override, if applicable. If the block is overridden and the request saved, the Resource Sharing Lending Requests page displays the new item.

Note

- The Save button is suppressed while in view mode.
- If your resource sharing library has been inactivated for lending and a request is sent by an ISO or NCIP peer-to-peer borrowing partner, the status of the lending request will be set to Rejected the borrower request. The borrowing request will then have its status changed to Rejected by partner. For more information on inactivating a resource sharing library, see Configuring Parameters of a Resource Sharing Library.
Locating Items for Resource Sharing

To locate 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)

The locate process matches a resource sharing request's metadata with a catalog resource.

The locate process creates a *rota* list of potential lending partners that are searched to fulfill the sharing request. The rota list is created based on rota templates (see Configuring Rota Templates).

This process is performed as part of peer-to-peer resource sharing, as follows:

- **Borrowing Locate** – Locates a borrowing request in the partner catalogs. Alma searches the catalogs of all rota partners to determine whether the partner owns the requested record. Only partners that own the requested resource are requested for the resource. If the locate fails, the partner is removed from the rota. Borrowing requests are blocked from being sent to lenders if there is a locally owned match for the requested material.

  When configuring a value in the **Holdings code** field on the Resource Sharing Partner page (Fulfillment > Resource Sharing > Partners, select Edit from the row actions list for an ISO partner), the locate process completes successfully only if the resource is found at the library specified by the **Holdings code** value. (For details, see Resource Sharing Partners).

  Alternatively, you can assign multiple libraries to a holdings code so that the locate process completes successfully when the item is found for any of the assigned libraries. For details, contact Ex Libris Support.

  For details on the borrowing locate process, see Borrowing Locate Process.

- **Lending Locate** – Locates a lending request in the lender's catalog. Alma searches the locate catalog to find a local repository match for the metadata of a request from an external requester. Lenders automatically know whether they own the requested resource, and can see the status of the relevant inventory at a glance.

  For details on the lending locate process, see Lending Locate Process.

- **Self Ownership** – Locates a borrowing request in the borrower's catalog prior to sending the request to the partner. This type of search determines whether a patron's resource request may be filled by local inventory, or whether the request must be directed to an external resource sharing partner as part of the borrowing locate process.

  For details on self ownership, see Self Ownership.

This section describes the various stages in the locate process, its monitoring tools, and how the process is configured.

### Borrowing Locate Process

The Borrowing Locate process is configured as part of the Locate Profiles (see Configuring Locate Profiles). Locate profiles are one of the following types:

- **Z39.50** – If the locate target is not an Alma institution, its catalog may be searched by Alma using the Z39.50 protocol. The target partner must be running an openly accessible Z39.50 server. A search query searches the request's title, author, ISSN/ISBN and year (publication date). If more than one query field has been specified, they must all be true to
return a successful result. A successful search in one or more partner databases is considered a success.

Alma may define locate targets of this type only if the locate target is part of Alma’s searchable external target. If a partner is searchable in this manner but the partner’s catalog is not in Alma’s list of searchable external targets, contact Ex Libris Data Services to make that catalog a searchable target.

- **Alma** – If the locate target is an Alma institution, its catalog may be searched using Alma APIs. This supports more precise locate options.

If your institution is a member of a fulfillment network or a member institution of a Network Zone, the locate process uses Alma internal record IDs rather than the request metadata. Therefore, in this circumstance, there is no need to configure the **Locate By Fields**. For other institutions, when using an Alma locate profile, if the lender and requester do not share the same Network Zone or Fulfillment Network, the locate process depends on the locate profile configuration:

- If the **Locate by Fields** check box is selected on the Locate Profile Details page, the locate process proceeds based on the selected subfields (Title, Author, ISBN/ISSN, Edition, OCLC Number, LCCN, Other Standard ID, Barcode, DOI).
- If the **Locate by Fields** check box is not selected on the Locate Profile Details page, or if none of the subfields have been selected, the locate process proceeds based on the following criteria: LCCN, OCLC Number, Title, and ISBN/ISSN.

You can specify whether the locate process will check physical resources and/or electronic and digital resources as follows:

- When **Ignore Physical Resources** is not selected and **Ignore Electronic and Digital Resources** is selected, Alma performs the locate process only for physical resources based on the bibliographic record.
- When **Ignore Physical Resources** is selected and **Ignore Electronic and Digital Resources** is not selected, Alma performs the locate process only for electronic resources similar to how the link resolver works and using the request’s volume/issue information and the lender’s coverage data.
- When **Ignore Physical Resources** and **Ignore Electronic and Digital Resources** are both unselected, Alma performs the locate process for physical resources based on the bibliographic record, and for electronic resources similar to how the link resolver works, using the request’s volume/issue information and the lenders’ coverage data. The electronic locate check is performed first.

The final locate behavior is also affected by the **rs_ignore_electronic_for_physical_request** parameter and **allow other formats** field, as seen below. This table describes how the locate process runs with regard to the possible combinations.

<table>
<thead>
<tr>
<th>Allow other formats is not selected</th>
<th>Allow other formats is selected</th>
</tr>
</thead>
<tbody>
<tr>
<td>ignore electronic regardless of format</td>
<td>ignore electronic regardless of format</td>
</tr>
<tr>
<td>ignore electronic if physical / physical non-returnable</td>
<td>ignore electronic regardless of format</td>
</tr>
<tr>
<td>ignore electronic regardless of format</td>
<td>ignore electronic regardless of format</td>
</tr>
</tbody>
</table>

Use the **rs_uresolver_locate** parameter to indicate that the locate process should consider volume/issue information for
electronic resources, similar to how the link resolver would search the rota members’ e-inventory. See Configuring Other Settings (Fulfillment).

- **BLDSS** - A locate may be performed using the British Library Document Supply Service. For more information on the BLDSS locate profile parameters, see Adding Locate Profiles.

- **Fulfillment Network** - If the lender and requester share the same fulfillment network, there is no locate process, since Alma knows which partner owns the requested title. The locate request is then processed as follows:
  - The request is stored in Alma with the list of fulfillment network members that own the resource.
  - For partners whose institution ID is part of the same fulfillment network as the requester:
    - If the institution ID is linked to the requester, the requested record is considered a locate success.
    - If the institution ID is not linked to the requester, the requested record is considered a locate failure.

You can configure an Alma locate profile to test for requestability and availability by selecting the **Check item availability** and **Check item requestability** check boxes on the Locate Profile Details page (see Configuring Locate Profiles). When selecting **Check item availability**, the locate process succeeds only if the record is found at the partner and at least one item is available (**Status In Place**). When selecting **Check item requestability**, the locate process succeeds only if the item is requestable (the **Is Requestable for Resource Sharing** policy = **True**).

Attach the relevant locate profile to a resource sharing partner (see Resource Sharing Partners).

You can activate the Borrowing Locate process automatically by selecting the relevant settings when configuring a locate profile, as described in the following procedure.

**To automatically activate the borrowing locate process:**

1. On the Organization Unit Details page (see Configuring Parameters of a Resource Sharing Library), select the **Cancel request on locate failure** check box for Alma to automatically cancel a request for which the locate process did not find any potential partner.

2. Select the **Automatically activate locate profile** check box for the borrowing locate process to be automatically triggered when a borrowing request is created from any interface – Alma, Primo or API.
The automatic locate process may be activated only if the Automatic Rota Assignment Rules have also been activated to automatically attach a rota to the request. The locate process then runs on the automatically attached rota.
To manually activate the Borrowing Locate process:

To manually activate the Borrowing Locate process, do one of the following:

- On the Resource Sharing Borrowing Request page (Fulfillment > Resource Sharing > Borrowing Requests, select Edit for a request), select the Locate button.

![Resource Sharing Borrowing Request Page – Locate Button](image1)

- On the Resource Sharing Borrowing Requests page (Fulfillment > Resource Sharing > Borrowing Requests), select the Locate Resource action. This link displays only if the request has an assigned partner or rota.

![Resource Sharing Borrowing Requests Page – Locate Resource Link](image2)

Lending Locate Process

The Lending Locate process can be activated automatically or manually after creating a lending request.

- To automatically activate the Lending Locate process, on the Organization Unit Details page (see To automatically activate the borrowing locate process above), select the Automatically locate resource check box. When a lending request is created, the resource is automatically searched for.

- To manually activate the Lending Locate process, on the Resource Sharing Lending Requests Task List page (Fulfillment > Resource Sharing > Lending Requests), select Locate from the row actions list.

The Lending Locate process succeeds if there is a single matching result and fails if there are no matching results. If there is more than one match, the rs_fail_locate_multiple_results parameter dictates the behavior (see Configuring Other Settings (Fulfillment)). If a title has more than one item, the availability and "requestability" are not checked in the locate process, and the request should be handled manually. In either failure case, the search query is displayed on the Repository Search page, and the operator can either manually attach the lending request to the local repository or select the Change Query link to change the search query.

A resource sharing library may be configured to automatically reject an incoming request if the requested title has no
available items. This can be done by selecting the **Reject request when no available item**, the **Reject request when no requestable items** and the **Automatically Locate Resource** switches in the Lending Setup of the Resource Sharing Library. If the switches are not turned on, the operator on the lender side will be able to manually decide whether to request the request if the requested item is not available.

The Lending Locate process is handled based on the metadata available for the request:

- If the request has been received with a record ID, the lending request is automatically linked to the identified record. A request can be received with a record ID by ISO ILL if the requester and borrower are part of the same fulfillment network and the request has been placed using the Network Zone record or a Primo deduplicated record. If the two records are deduplicated in Primo and the request is placed from Primo, the locate process will consider all inventory as candidates for fulfilling the request, and will access any inventory that is requestable for resource sharing. If the request is placed from Alma, the deduplication is not relevant, and the record that was chosen for the request is the one that will be used.
- If the request has been received without a record ID, the record is located based on the selected **Locate by Fields** values on the Organization Unit Details page (Configuration Menu > Fulfillment > Library > Opening Hours, select the Summary tab).
- If the **Locate by Fields** check box is not selected, or if none of the subfields have been selected, the locate process proceeds based on the following criteria (in the indicated order): LCCN, OCLC Number, Title, and ISBN/ISSN.
- If the Remote Record ID was specified on the request, the locate process will be performed solely on the Remote Record ID.

---

### Self Ownership

The Self Ownership check determines whether a requested resource is locally owned at the requester's institution. When creating a new borrowing request in Alma, a warning message (**The institutional inventory has services for the requested title**) displays if the requested resource is owned by the local institution.

The Self Ownership check is handled as follows:

- The record is located based on the selected **Locate by Fields** values on the Organization Unit Details page (Configuration Menu > Fulfillment > Library > Opening Hours, select the Summary tab). See **To automatically activate the borrowing locate process** above.
- If the **Locate by Fields** check box is not selected, or if none of the subfields have been selected, the locate process proceeds based on the following criteria (in the indicated order): LCCN, OCLC Number, Title, and ISBN/ISSN.

When performed on the Primo Get It tab, self-ownership is determined by resolving the incoming OpenURL to an existing resource, and is therefore based on the resolver's matching mechanism rather than the above mentioned configurations.
Receiving and Shipping Resource Sharing Items

Receiving Items

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 are at a resource sharing library circulation desk; see Library/Desk Selector in The Persistent Menu.

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.

2. Select an Identifier type by which received items are to be identified:
   - Barcode
   - External identifier

3. Clear the Automatically notify patron check box to prevent Alma from sending a notification email to the requesting patron when the item arrives at the resource sharing library. This can be useful for Resource Sharing Borrowing Requests with the format Physical non-returnable, when the receive operation is used to notify Alma that an item has already been supplied directly to the patron, so that no additional item ready for collection notification to the patron is required. By default, this check box is selected.
4. Optionally, add a note in either or both of the following fields: This note appears in the following format:

<Name of partner><Note text>

5. **Internal note:** A note that appears only on the side from which it is sent (that is, when configuring a note from the borrower, the note appears only in the list of borrowing requests. When configuring a note from the lender, the note appears only in the list of lending requests). These notes do not appear on the **History** tab, and are to be used for notes not intended to be publicized (that is, they are not sent to the peer partner). An example of a note would be a borrower writing, **This lender has historically been difficult to deal with.**
   - **Note to partner:** The note that is sent to the partner. This note appears in the **Notes** tab of both the sender of the note and the receiver of the note, and on the request's **History** tab (i.e. – **Only in reading room**).

6. Enter a barcode or an external identifier for the received resource in the **Barcode** or **External identifier** field and select **OK**. The field that appears corresponds to the **Identifier type** selection, performed in step 2.
   - If you selected **Physical** as the received format, a dialog box opens where you configure receiving information for the item:

![Receiving a Physical Item Dialog Box](image)

Configure the fields in the dialog box fields, as described in the following table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automatically print slip</td>
<td>Select <strong>Yes</strong> to automatically print the Resource Sharing Receive Slip Letter, the option defaults to <strong>No</strong>. The selection is remembered for the duration of the session. When set to <strong>Yes</strong>, if multiple items are being scanned, a print slip is generated for each barcode. For more information on configuring the letter, see <a href="#">Configuring Alma</a>.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Multiple Items</td>
<td>Select the check box if multiple items were received from the lender for this request.</td>
</tr>
<tr>
<td>Temporary barcode</td>
<td>Enter the item’s temporary barcode.</td>
</tr>
<tr>
<td>Item policy</td>
<td>Select an item policy for the item. For details on item policies, see Configuring Item Policies.</td>
</tr>
</tbody>
</table>
| 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 NCIP Parameters).                                                                                                                                                                                                                                                                                                                                 |
| Fulfillment note         | Enter a note, as required.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 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 the section, To handle a non-deliverable item and enable it for delivery, in Receiving Items).                                                                                                                                                                                                 |
| Internal note            | As described in step 4 above.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Note to partner          | As described in step 4 above.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Shipping Cost            | The shipping cost is defined in the relevant policy. It may be overridden by changing the value at this point.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Patron Receive Cost      | The patron receive cost is the resource sharing receive fee defined in the relevant policy. It may be overridden by changing the value at this point.                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Patron Request Cost      | The patron request cost is the resource sharing request fee defined in the relevant policy. It may be overridden by changing the value at this point.                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| For Reading-Room Use Only| Select to restrict access to a reading room.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |

**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). 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.
Select **Complete the request** when you have completed the 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*.

7. When working with a **Physical non-returnable** request, select **Complete the request** to change the item’s status to *Request Completed* and mark the request 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*. If **Automatically Print Slip** is set to **Yes**, the Receiving Slip Letter (code: ReceivingSlipLetter) is printed for physical and physical non-returnable items. For more information on the receive slip, see Configuring Alma Letters. For more information about non-returnable requests, see the Non-Returnable Borrowing Requests video (4:26 mins).

8. If the lender is an ISO or NCIP partner, the request’s status is updated and the **Received** message is sent.

If an item is scanned in twice, the item will be added to the list, displaying data from the initial receive, but no additional action is taken. This is to prevent mistakes when an item for receiving is scanned twice, which would otherwise cause the return step to immediately take place.

**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, **Item cannot be loaned to patron - insufficient due date**, is displayed.

Do one of the following:

- Select **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**.
- Select **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.

**Shipping Items**

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)

Alma performs the following steps prior to a resource sharing request being shipped:

1. If a resource sharing request was not previously created, the request is created and linked to a resource sharing partner.
2. The item is moved to a temporary location based on the partner configurations you have set up.
3. The item is marked as Shipped Physically and is unavailable in Alma.

You can update the due date and shipping cost simultaneously for multiple items being shipped together.

You can ship items on the Shipping Items page (Fulfillment > Resource Sharing > Shipping Items).

**Note**

- The Shipping address type is mandatory for ISO or NCIP enabled resource sharing libraries. When an ISO/NCIP request is sent, it includes the Shipping address as the address to which the request should be shipped. The lending institution, when shipping digitally, ships to this address. For more information about configuring the shipping address, see [Managing Institution/Library Contact Information](#).
- The system blocks shipping items that are in process such as on loan, on hold shelf or in acquisition.

The fields displayed on the Shipping Items page depend on the selected Shipping Format.

![Shipping Items Page - Physical format](image)

An option exists to create a lending request automatically if it hasn't been created when shipping an item. This allows libraries that manage lender requests manually to perform two steps in one action. In order to accomplish this, turn on the **Automatic Creation** attribute for the resource sharing library (see [Configuring Parameters of a Resource Sharing Library](#)). This makes the partner field visible on the shipping items page for physical requests. The partner field is mandatory if the request ID entered does not exist. Attempting to leave the partner field blank results in an error message; Selecting a partner is mandatory when the request has not been previously created. After selecting the partner, a new pop-up window warns, Lending request does not exist in the system. A new request will be created. The pop-up window optionally may be turned off in the customer parameters (see [Configuring Other Settings](#)). The new lending request is created and marked as shipped.

For more information about lender workflow optimization, see the [Lender Workflow Optimization](#) video (3:11 mins).
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, in the **Automatically Print Slip** field, select Yes (the default is No). The selected option in this field is persistent for a user during a single session. This option automatically sends a print a Resource Sharing Shipping Slip Letter when shipping an item. The shipping print slip is sent for the item specified in the **Scan request ID** and **Scan item barcode** fields. The slip contains information that is specific to the item being shipped. For information about configuring the Resource Sharing Shipping Slip letter, see [Configuring Alma Letters](#).

   You can manually print a shipping slip by selecting the **Print Slip** link on the Resource Sharing Lending Requests Task List page (see the Print Slip description in the Request Sharing Lending Requests Task List Links table in [Managing Resource Sharing Lending Requests](#)).

2. In the **Shipping Format** field, select the format in which the request is shipped.

3. In the **Shipping cost** field, enter a shipping cost for the item.

4. In the **Due date** field, enter a date by when the item must be shipped. This field appears only when **Shipping format** = Physical.

5. When shipping a resource sharing lending request, in the **Location** field, specify a temporary location for the item to be shipped. The options appearing in the **Location** field are the locations for the library (appearing in the **Currently at:** field in the persistent menu). 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 appears only when **Shipping format** = Physical, and is enabled only when one of the following is true:

   ◦ You are at a resource sharing library circulation desk; see Library/Desk Selector in [The Persistent Menu](#).
   ◦ You enter the External ID of a lending request in the **Scan Request ID** field.
   ◦ You access the Shipping Items page using the **Ship Item** link on the Resource Sharing Lending Tasks List page.

6. Optionally, add a note in either or both of the following fields: This note appears in the following format:

   `<Name of partner><Note text>`

   ◦ **Internal note:** A note that appears only on the side from which it is sent (that is, when configuring a note from the borrower, the note appears only in the list of borrowing requests. When configuring a note from the lender, the note appears only in the list of lending requests). These notes do not appear on the **History** tab, and are to be used for notes not intended to be publicized (that is, they are not sent to the peer partner). An example of a note would be a borrower writing, *This lender has historically been difficult to deal with.*

   ◦ **Note to partner:** The note that is sent to the partner. This note appears in the **Notes** tab of both the sender of the note and the receiver of the note, and on the request’s **History** tab (i.e. – **Only in reading room**).

7. 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.

8. 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**.

9. In the **Scan request ID** field, enter the item's external identification number.

10. Select **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.

   Repeat step 7 and step 9 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.

   If an item is scanned in twice, the item will be added to the list, displaying data from the initial ship, but no additional action is taken. This is to prevent mistakes when an item for shipping is scanned twice.

---

**Receiving or Shipping Multiple Items for a Single Request**

**Borrowing Requests**

It is possible to receive and return more than one item for a single borrowing request. The receive or return operation will be considered done when all items are scanned in, though a partial receive may also be done. Items may be added to a request after the original receive if the request is still in an active status. A manual receive can be done from the row action in the **Borrowing Task List** and from the **Receiving Items interface**. A manual return can be done from **Return Items**, the **Returns** tab in **Patron Services** and **Scan in Items**.

On the Receive Items screen, the **Multiple Items** check box is visible only if the Physical format was chosen on the
receiving interface. When the check box is selected, as each item is scanned and accepted, the barcode field is cleared. Select Done to indicate that all parts of the request have been scanned, and send a hold shelf notification to the patron. Selecting done also triggers the following validations on the entered barcodes:

- No barcodes are empty
- No barcodes are duplicated
- No barcodes are already used (in the repository)

If the request is still missing some items, a receive may still be done to indicate a partially received request. When the additional items are received, they can be added to the main request if the request is not returned yet and the multiple option is selected.

The Borrowing Requests Lists have a link for Multiple Barcodes when multiple items have been shipped or received. Selecting the link opens the request to the Received Items tab.

![Borrowing Request List with a Multi-Item Request](image1)

When selecting the Return action, the Return pop-up window indicates that this is a multi-item request.

![Received Items Tab of the Request](image2)
To add items to a request after the original receive:

1. On the Received Items page (Fulfillment > Resource Sharing > Receiving Items), enter the External Identifier and select OK. A pop-up appears indicating that the request is already received.

2. Select Confirm. A pop-up appears to enter the barcodes. Enter the barcodes one at a time and select OK after each one. (See Receive Multiple Items above.)

   **Note**

   When accessing the pop-up after the original receive, the multiple items check box, due date and costs are view-only, taking their values from the original receive.

3. Select Done when all barcodes are entered.

   The following behaviors apply to multi-item requests:

   • The status of the request changes to **Loaned to Patron** when any of the items is loaned.
   • Cancelling a hold request cancels only the specific hold request. The parent borrowing request is only canceled if all items are canceled.
   • Renew and recall messages received from the lender update all loans under the parent request.
   • Only one renew fee is applied to the loan.
   • In Primo, only one item will appear for the request on the **Requests List** of the **My Account** tab.

   For more information, see Resource Sharing Requests with Multiple Items and More Information About Receiving Multiple Resource Sharing Items (Borrower).

Lending Requests

For more information about shipping multiple items for lending requests, see the Shipping Lending Requests with Multiple Items video (1:42 mins).

Lending requests may ship multiple items attached to a single request. If multiple move requests have already been created for the lending request or if the request has already been shipped and more items are being shipped, Alma will automatically mark the lending request as a multiple item request. Otherwise, adding multiple items is done during the process of shipping items to the borrower. This can be done from the shipping interface or the **Ship Item** row action of the Lending Requests Task List.
After checking the **Multiple items** check box and scanning the first item’s barcode, the multi-item window displays.

For each item, the barcode is scanned. When all items are done, select **Done**. The lending request status changes to **Shipped Physically** and the barcode is displayed as **Multiple barcodes**.

Selecting the **Multiple Barcodes** links opens the lending request to a new tab, **Items**.
When shipping to an ISO partner, or an NCIP peer-to-peer partner, a shipped message is transmitted. When the borrowing institution receives the message, the message is recorded in the **History** tab of the borrowing request. The borrowing request's status is changed to **Shipped Physically**.

**Lending Request - Items Tab**

When shipping to an ISO partner, or an NCIP peer-to-peer partner, a shipped message is transmitted. When the borrowing institution receives the message, the message is recorded in the **History** tab of the borrowing request. The borrowing request's status is changed to **Shipped Physically**.
Configuring Alma/Broker Integration

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

1. Define the Resource Sharing Library and the Calendar Management settings to determine a loan’s due date (see Configuring the Institution and Its Libraries).
   
   You can also configure Terms of Use and policies to determine when an overdue fine is invoked (see Physical Fulfillment).

2. Configure a physical location for the resource sharing library, as needed (see Configuring Physical Locations). Ensure that you select the resource sharing library in the 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).

3. Configure a circulation desk (see Configuring Circulation Desks).

   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.

4. Configure the relationships that the resource sharing library has with other libraries in the institution (see Configuring Fulfillment Services Between Libraries Within an Institution).

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

6. Configure display logic rules to define the instances in which instances Resource Sharing links display (see Configuring Display Logic Rules).

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

8. Configure a resource sharing partner to define the type of communication between Alma and the broker (see Resource Sharing Partners).

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

   On the General Information tab:
   
   ◦ **Profile Type**: NCIP (for Libris, see Importing Resource Sharing Borrowing Requests from an External System)
System Type: <Broker Name> ILL

On the Parameters tab:

In the General Information section:

- User identifier type: Select the type of ID to be used by the broker to identify the patron in the messages (for Relais, select Primary Identifier). Note that if the configured identifier is not found, the primary identifier is used instead. See Viewing Additional User Identifier Types.
  
- Request pushing method: OpenURL or Link (for Relais, select OpenURL)
  
- URL template:
    - The URL or base URL of the OpenURL that Alma will use to link to the broker system when a patron places a request to the broker system using the Primo GetIt link. For Relais: https://h7.relais-host.com/xxxx/loginpRFT.jsp?LS=XXXX where xxxx and XXXX is the code by which the library is identified in the Relais system.
  
- Add user auto login to URL. For Relais: Yes
  
- Enable service for guest user: Depends on the policy in use; generally, the value is No
  
- Loan period: The amount of time the user has before having to return the item to the resource sharing library
  
- Default library owner: The resource sharing library that will own the broker's requests

In the Request Item section:

- Bibliographic record ID type: other_system_number
  
- Supports Borrowing: Most broker systems send the RequestItem message only for lending request. Select this option if the broker system does send RequestItem when a borrowing request is created. If selected, also enter:
    1. Default location: The physical location in which the temporary item will be created for the borrowing request.
    2. Default Pickup Library: The default pickup location for the borrower request, if it is not indicated by the broker system in the message.

When a RequestItem message is received by Alma, the system determines whether it is a borrowing request or a lending request based on the AgencyId that is indicated by the broker system for the UserId. If it is the same as the AgencyId in the InitiationHeader, then Alma identifies the message as a borrower request.

In the Check-Out Item section (defines how items checked out on the lending side are to be managed):

- Default location: The physical location to which the received temporary item will belong
- Default item policy: The created item policy

In the Accept Item section (defines how items received on the borrowing side are to be managed):

- Default location: The physical location created for the resource sharing library
  
- Automatic receive: Select to indicate that items received at the broker will be considered received in Alma (and automatically placed on the hold shelf). Leave blank to indicate that another wand-in action will be required in Alma to place the item on the hold shelf.

Select if the broker system can communicate the barcode that will be used in Alma in the message.

- Receive desk: When Automatic receive is selected, this parameter defines at which desk the receive action will
be considered to have been performed when updated from the broker system.

In the Look Up User section:

- **Require authentication**: No

9. Define a terms of use (see Physical Fulfillment). Ensure that the 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 the broker's system. This Terms of Use is also used to set fees to be charged to specific user groups when an item from a borrowing request is received.

10. Define a fulfillment unit (see Physical Fulfillment). Ensure that the Configuring: drop down displays a resource sharing library.

11. Define a z39.50 server integration profile (see Configuring Integration Profiles).

---

### Configuring Communication Between the Broker and Alma

The URL to be used for communication between Alma and the broker is:

- **ILLiad, OCLC Navigator, Relais**: https://<Alma domain>/view/NCIPServlet
- **INN-Reach**: https://<Alma domain>/view/NCIPServlet/v1

For details on configuring the broker’s system, contact your broker’s support team.
Courses and Reading Lists

This section includes:

- Courses and Reading Lists Workflow
- Managing Courses
- Managing Reading Lists
- Managing Citations
- Configuring Leganto
Courses and Reading Lists Workflow

Courses, reading lists, and citations can be managed manually using the Alma user interface, or automatically by an external service, such as Ex Libris Leganto or the Alma Web service. 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...a/apis/courses](https://developers.exlibrisgroup.com...a/apis/courses).

The diagram below illustrates the hierarchy of the course, reading list, section, and citation entities.

- Citations are the basic processing units. Citations refer to a resource, such as Alma inventory or a website. They are typically 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 by a course in the course list or by 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 sections within reading lists. A section is a logical group within a reading list, such as “Week 1” or “Optional”. The same citation can appear in multiple sections.

Sections can be managed using only Leganto.

- A reading list is connected to a single course. However, if you are using Leganto, a reading list can be connected to multiple courses. A course can contain several reading lists, for example, reading lists that are processed by separate libraries.

The task of managing courses and reading lists includes the following elements:
1. Creating new courses, reading lists, and citations.

Librarians create courses, either directly or using the course loading integration profile. When creating a course, you can add instructors (users who have the Instructor role) to the course. Instructors can add or manage reading lists and citations using Leganto (see Introduction to Leganto). Librarians can use either Leganto or Alma to manage reading lists and citations.

In Leganto, an instructor can create a reading list that is not associated with a course (and, when enabled by the library, can even create the course). To enable an instructor to create a reading list associated with a course, or to associate a reading list to a course, a librarian must first add the instructor to the course in Alma.

The user who first creates a reading list is the reading list owner. An owner (or librarian) can invite other instructors as owners or as collaborators. Collaborators can manage a list but not delete it. Reading list owners and collaborators are relevant only for Leganto.

- For information on creating new courses, see Adding a Course.
- For information on creating new reading lists, see Adding a Reading List.
- For information on creating new citations, see Adding Citations to a Reading List.
- For information about managing reading list ownership in Alma, see Configuring Reading List Ownership.

2. Newly created citations and reading lists have the status Being Prepared. When an instructor uses Leganto to create a reading list, the instructor can send items to the library: notify the library that a citation, reading list section, or the entire reading list is ready for processing. This changes the status of the citations and/or reading list to Ready for Processing. Note that some citations may be marked as Complete automatically based on Leganto parameters (see Configuring Default Statuses for Citations/Reading Lists).

3. 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 on the Course’s Reading List page (see Managing Reading Lists). 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 Managing Citations.
- Fetching items from shelves to move them to reserved areas, or placing requests on remote items. For detailed information, see Managing Citations.

4. Reading lists in process are marked as Being Processed. Citations in process are marked In Process. When complete, reading lists and citations are marked as Complete.

- If you are using Leganto, the instructor or librarian must change the reading list's publication status to one that enables students to view the list, instead of Draft.
- Reading list information must also be published with other data when publishing to Primo.

5. 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.

6. In most cases, after a course is finished, its reading lists are changed to have a reading list status of Inactive. You can delete them from Alma (individually or using a job), or an instructor can delete them from Leganto. If you are using Leganto, you can configure different ways to handle deleted reading lists:

- You can mark them as Inactive or delete them.
- You can configure that, when an instructor deletes a reading list in Leganto, it remains in Alma with the publication status Deleted. Deleted lists do not appear in Leganto and do not appear in search results, and do not appear in Analytics. A librarian can purge or restore the reading list.
- Librarians can set the publication status of a reading list to Archived rather than delete them. Archived lists do
not appear in Leganto and do not appear in search results, but continue to appear in Analytics. A librarian can purge or unarchive the reading list.

7. You can delete courses or roll over reading lists from year to year, in bulk, using the course loading integration profile. In Leganto, an instructor can roll over reading lists one-by-one.
Managing Courses

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

- Course Reserves Operator/Manager
- Fulfillment Services Operator/Manager

You can import course information using the Course Loader integration profile. For more information, see Configuring Course Loading. You manage courses on the Courses page (Fulfillment > Course Reserves > Courses). Opening this page directly lists all the courses that have been created for an institution. When searching for courses using the Simple and Advanced Searches, this page displays the results.

Courses Page

From this page, you can search for courses using the search box at the top of the page and filter your results by selecting the following facets:

- Course Status

- Associated Lists:
  - Exist (number of courses)
  - None (number of courses)

- Processing Department
- Academic Department
- Campus
- Year
- Terms list

To publish course information to Primo, see Configuring Course Reserves in Primo. To publish course information to Summon, see Enabling the Course Reserves Facets in Summon and Configuring the Course Reserves View.
Adding a Course

To add a course to a department and define its attributes:

1. On the Courses page (Fulfillment > Course Reserves > Courses), select Add Course. The Manage Course Information page opens.

Manage Course Information Page

2. Enter the course information as required:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code (Required)</td>
<td>The combination course code + section must be unique. If you do not use sections, then all course codes must be unique.</td>
</tr>
<tr>
<td>Section</td>
<td>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. The combination course code + section must be unique.</td>
</tr>
<tr>
<td>Name (Required)</td>
<td>Does not have to be unique.</td>
</tr>
<tr>
<td>Processing department (Required)</td>
<td>The department that &quot;manages&quot; the course. This field is currently for informational purposes only. Use the quick pick list to select a department predefined by an administrator (see Configuring Processing Departments)</td>
</tr>
<tr>
<td>Academic department</td>
<td>The academic department associated with the course. Select from a list predefined by an administrator (see Configuring Academic Departments)</td>
</tr>
<tr>
<td>Terms list</td>
<td>The term during which the course is taught. Select from a list predefined by an administrator (see Configuring Course Terms)</td>
</tr>
</tbody>
</table>

Note

- If you are using Leganto, you can enable instructors to add courses directly in Leganto when arriving from a CMS; in addition, you can enable instructors to modify the course's dates and/or number of participants in Leganto. See Configuring Whether Instructors Can Create or Modify Courses.
- You can add courses in bulk using the course loading integration profile. For more information, see Configuring Course Loading.

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<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submit Lists By (Leganto only)</td>
<td>A date that is intended to prompt instructors to send you their reading lists for processing with enough time to process them before the course begins. The notification about this date appears in Leganto for all reading lists associated with the course.</td>
</tr>
</tbody>
</table>
| Status                                        | The status. This field is disabled when you are creating the course.  
  ◦ **Active** – The course is currently being taught  
  ◦ **Inactive** – The course was taught, or will be taught, but is not currently being taught |
| Start date                                    | The current date is the default date. An administrator can set the default for this value, see `default_course_start_date` in [Configuring Other Settings](#). |
| End date                                      | This date cannot be earlier than the start date. An administrator can set the default for this value, see `default_course_end_date` in [Configuring Other Settings](#).  
  Note: The course’s end date is transferred to the course’s reading lists. |
| Number of participants                        | The number of students that are enrolled in the course. This field is only active if you are not using campuses, or the number of participants is not defined for any campuses. Otherwise, the value in this field is the sum total of participants for all campuses. |
| Weekly hours                                  | The number of hours the course is taught, per week. |
| Year                                          | Academic course year. |
| Searchable IDs                                | Additional IDs for the course, Used for search indexes in Primo and external systems. |

**Tabs:**

| Instructor | On the Instructor tab, browse for the instructor of the course (the list consists of all Alma users), and select Add Instructor. The instructor is added to the course.  
  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.  
  (Leganto only) By default, instructors appear to student and guest users in Leganto in course-related tooltips and in a pane for reading lists associated to this course. Instructors that are configured to appear in Leganto have a green checkmark in the Display Instructor column in this tab. To configure an instructor to appear / not appear in Leganto, select Unhide / Hide in the row actions list for the instructor. See [Enabling Instructor Information in Leganto](#).  
  (Leganto only) Instructors arriving from the CMS are added as instructors to the relevant course, if they are not already associated with the course as an instructor.  
  Multiple instructors are listed by name in the header of the Course’s Reading List page ([Fulfillment > Course Reserves](#)). |
3. Select **Save**. The course material is saved.

---

**Note**

Modifying course statuses, as well as course activation/deactivation (and any ramifications), is handled by the **Activate/Deactivate Courses** job. For details, see **Activate/Deactivate Courses**.

---

**To duplicate a course (creating a new course based on an existing one):**

1. On the Courses page (**Fulfillment > Course Reserves > Courses**), select **Duplicate** in the row list actions for a course. The Manage Course Information page appears. For details on the displayed fields, see the **Manage Course Information Fields** table above.

2. Modify the relevant fields as required, and select **Save**. The new course appears on the Courses page.

---

**Editing a Course**

---

**Note**

You can edit courses in bulk using the course loading integration profile. For more information, see **Configuring Course Loading**.

---

**To edit a course:**

1. On the Courses page, (**Fulfillment > Course Reserves > Courses**), select **Edit** in the row actions list for a course. The Manage Course Information page opens. If the course was rolled over from another course, a link to the original course appears in the header; for more about course rollover, see **Rolling Over Courses**.

2. Modify the course information as required; see **Adding a Course**. When editing a course, you can add notes in the **Notes** tab (see **Editing a Reading List**).

3. Select **Save**.
Managing a Course's Reading Lists

You can view a course's reading lists, reorder how they appear in Leganto, and/or copy them to a course. For details on working with reading lists, see Managing Reading Lists.

Viewing and Reordering a Course's Reading Lists

To view a course's reading lists and/or reorder how they appear in Leganto:

On the Courses page (Fulfillment > Course Reserves > Courses), select Reading List in the row actions list for a course. The Course's Reading List page appears. This page contains the reading lists associated with the course.

You can also reach this page from the Reading Lists Task List page (Fulfillment > Course Reserves > Reading Lists, select All Reading Lists for this Course in the row actions list for a reading list). If the reading list is associated with multiple course, this action is not available; select a course code from the Course column to view the reading lists of that course.

Copying and Adding Reading Lists to a Course

To copy reading lists and add them to a course:

1. On the Courses page (Fulfillment > Course Reserves > Courses), select Copy Reading List in the row actions list for a course. The Reading Lists Task List page appears.

   The Reading Lists Task List page displays all reading lists defined for your institution.
2. Select the check box of each reading list you want to add to the course and select **Select**. The reading lists are added to the course.

To view the added reading lists, select **Reading List** in the row actions for the course.

---

**Managing User and Course Enrollment Information**

You can import user and course enrollment information into Alma, which allows students to see all of their reading lists on the Lists page without having to enter Leganto using an LTI link for each reading list. With this enhancement, you can use Alma to view student enrollment information and to remove students from courses.

Importing user and course enrollment information is performed using the Course Enrollment integration profile (see [Configuring Importing Course Enrollment Jobs](#)).

To enable the management of student enrollment information in Alma, the **display_course_students** field has been added to the Customer Parameters mapping table ([Configuration Menu > Fulfillment > General > Other Settings](#)). When set to **true**, you will be able to view enrollment information in the following tabs:

- **Students** – This tab has been added to the Manage Course Information page ([Fulfillment > Course Reserves > Courses](#)) to allow you to view all students that are enrolled in a course and to delete specific students or all students from a course.

  ![](image)

  **Manage Course Information Page - Students Tab**

- **Courses** – This tab has been added to the User Details page ([Admin > User Management > Manage Users](#)) to allow you to view all courses to which a student has enrolled and to delete specific courses or all courses to which a student has enrolled.

  ![](image)

  **User Details Page - Courses Tab**
Rolling Over Courses

If you know how to map between the old and new years' course codes, you can roll over courses, in bulk, from one year to the next using the course loading integration profile. Use the following configuration options for the integration profile:

- In the tab-separated data file:
  - Enter all of the mandatory fields for each new course, and enter ROLLOVER as the action in the Operation field.
  - Enter the old course ID and section ID in the Old Course Code and Old Course Section ID fields, respectively.
  - For each field whose value you want to copy, enter + in that field.
- To copy (or not) old course reading lists and instructors to the new courses, ensure that the rollover options are correctly configured in the integration profile.
- If you are using Leganto, see Leganto Course Rollover.

For more information, see Configuring Course Loading. If you are using Leganto, instructors can roll over their reading lists manually.

Deleting a Course

Note

You can delete courses in bulk using the course loading integration profile. For more information, see Configuring Course Loading.

To delete a course:

On the Courses page (Fulfillment > Course Reserves > Courses), select Delete in the row actions list for a course, and select Confirm in the confirmation dialog box.
Managing Reading Lists

To manage a course’s reading list, you must have one of the following roles:

- Course Reserves Operator/Manager attached to a course department
- Course Reserves Viewer (read-only access)
- Fulfillment Services Operator/Manager attached to a course department

After adding courses, you can manage the reading lists for the courses. 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.

See also Managing a Course’s Reading Lists for reordering or copying reading lists within or between courses. For information on citations, see Managing Citations. To publish course and reading list information to Primo, see Configuring Course Reserves in Primo.

You access reading lists on the Reading Lists Task List page, either by selecting Reading list in the row actions list for a specific course on the Courses page or by navigating to Fulfillment > Course Reserves > Reading Lists. This page has Assigned and Unassigned tabs (see Assigned to Me, Unassigned, and Assigned to Others Tabs). In addition, the page has an All tab that contains all of the reading lists that appear in the other tabs. When accessing this page from the persistent menu, the default view is the Assigned to Me tab with the Processing Department filter set to your department.

You can also access this page by searching for reading lists; see Searching in Alma.

You can also access this page by selecting one of the Reading List tasks in the task list (see Tasks in the Task List).

- If the task contains the words Assigned to Me, Unassigned, or Assigned to Others, then that tab is pre-selected by default. Otherwise, the All tab is pre-selected by default.
- The last part of the task name indicates a pre-selected option for the Status facet or Alert filter.

**Note**

The alert List has new note only appears on the Reading List Tasks List page. This alert is associated with the list, not a specific citation. All other alerts are associated with one or more citations in the reading list.
The fields on this pages are as follows (note that some columns are initially hidden, by default):

- **Code** - The reading list code
- **Name** - The reading list name
- **Status** - The reading list status

**Note**

The reading list status does not affect whether the reading list is published in Primo. For a list of predefined reading list statuses, see Reading List and Citation Statuses in the Leganto Administration Guide. You can define other reading list statuses, see Configuring Additional Reading List Statuses.

- **Assignee** - The user assigned to manage this reading list. (This column is only useful in the Assigned to Others tab.)
- **Owner/s** - The reading list's owners; ownership is relevant only to Leganto customers (see Configuring Reading List Ownership). If there are multiple owners, Multiple appears.
- **Due Back Date** - The default due back date for the citations on the reading list. This value is inherited from the course.
- **Alerts** - A checkmark appears if there is at least one alert about the reading list
- **Request for Review** (Leganto only) - The date that the instructor submitted the list to the library for processing
- **New for September! Review Requester** (Leganto only) - The name of the instructor who submitted the list to the library for processing
- **Academic Department** (hidden by default) - The course's academic department
- **Processing Department** (hidden by default) - The course's processing department
- **Start Date** (hidden by default) - The course's start date
- **End Date** (hidden by default) - The course's end date
- **Course Code** (hidden by default)
- **Course Section** (hidden by default) - The course section (not the reading list section)
- **Course Terms** (hidden by default)
- **Publication Status** (Leganto only; hidden by default) - The read list's publication status in Leganto

**Note**

The publication status does not affect whether the reading list is published in Primo.

- **Creation Date** (hidden by default) - Reading list creation date
- **Modification Date** (hidden by default) - Reading list last updated date
- **Advisor Score** (Leganto, only; hidden by default) - The reading list's advisor score, if enabled
• **Campus** (hidden by default) - The course's campuses, if defined

Reading lists are managed by librarians based on personal assignment (**Assigned to Me** or **Unassigned tabs**) and not by their respective courses. To manage reading list assignments, see [Releasing and Reassigning a Reading List](#). Note that only managers can view and reassign reading lists that are assigned to others.

Reading lists can have multiple owners and collaborators. Ownership of a reading list is relevant only in Leganto. For more information, see [Managing Reading List Owners and Collaborators](#).

A reading list can have multiple sections. Sections can be managed only using Leganto. Reading lists created in Alma or using the Alma Web service API have a single default section.

---

**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/courses](https://developers.exlibrisgroup.com/alma/apis/courses).

- If Leganto is enabled for your institution, instructors can use Leganto to create the reading lists. For more information, see the Leganto [Product Overview](#). After creating the lists, instructors send them to the library for processing. Librarians can use the Alma interface described here to make changes to the lists.

- Archived reading lists continue to appear in Analytics. Deleted and purged lists do not.

---

**Facets/Filters:**

The page (depending on the tab) includes the facets **Processing Department, Academic Department, Terms List, Course Year, List Assigned To, Assigned Date, Status** (see [Reading List and Citation Statuses](#)), **Publication Status** (see [Reading List and Citation Statuses](#)), **List creation date, List modification date, and Request for review**, as well as the filter **Alerts** (see [Removing alerts from citations](#)).

---

**Note**

The following descriptions of the possible values are true for the facets **Assigned Date, List creation date, List modification date**, and **Request for review**:

- **Today** - Requests created on current date
- **Yesterday** - Requests created day before current date
- **Up to three days ago** - Requests created two or three days before current date (excluding today and yesterday)
- **Up to a week ago** - Requests created between four to seven days before current date (excluding above three options)
- **Up to a month ago** - Requests created between eight days and a month before current date (excluding above four options)
- **Older** - Requests created more than one month before current date

---

In addition, for Leganto:
• The status Processing matches reading list that is not marked as Complete, including Inactive or Declined.

• For publication status, Published matches all reading lists that are not Draft, Archived, or Deleted, and Active (which is selected by default) matches all reading lists that are not Archived or Deleted.

• The processing department Undefined matches any reading list that does not have an associated course.

• If you have reading lists associated with multiple courses, some facet values are counted once for each course, and so their combined totals may be higher than the number of read lists on the page.

You can perform the following actions on reading lists on the Reading List Task Lists page:

• View - Select View in the row actions list. When you view a reading list, you cannot make changes to it.

• View all reading lists of one course - Select All Reading Lists for this Course in the row actions list; see Managing a Course’s Reading Lists. If the reading list is associated with multiple courses, this action is not available. You can view all reading lists associated with a course on the Courses page; see Managing a Course’s Reading Lists.

• View in Leganto (Leganto only) - Select View in Leganto in the row actions list. Relevant for active lists.

• Associate with a course or change course association - Select Associate this list with a course in the row actions list. See Editing a Reading List. Relevant for active lists.

• Clear association with a course - Select Remove associated course in the row actions list. See Editing a Reading List. Relevant for active lists.

• Release from being assigned to you - Select Release Assign in the row actions list on the Assigned to Me or Assigned to Others tab. See Releasing and Reassigning a Reading List. Relevant for active lists.

• Reassign to someone else - Select Reassign in the row actions list. See Releasing and Reassigning a Reading List. Relevant for active lists.

• Edit (work on) - Select Work On in the row actions list. See Editing a Reading List. Relevant for active lists.

• Unarchive - Select Unarchive in the row actions list. Resets the list publication status to Draft. Relevant for archived lists.

• Duplicate - Select Duplicate in the row actions list. Modify the new reading list as needed. When you duplicate a course in Alma via the Reading List Task List, the course associated to the original list will not show up in the duplicated list.

• Delete - Select Delete in the row actions list and select Confirm in the confirmation dialog box. If you delete a reading list while the course is active, any citation requests that were fulfilled are canceled. Requests that were fulfilled remain at the circulation desk until they are due back. If you are using Leganto, then you can configure whether deleted reading lists are immediately purged or remain in Alma, where they can then be purged or restored (see Configuring What Happens to Deleted Lists). Otherwise, the reading list is immediately purged from Alma. Not relevant for deleted lists.

• Purge - Select Purge in the row actions list. Purges a deleted list (removes it from Alma entirely); this action cannot be undone. Relevant for deleted lists.

• Restore - Select Restore in the row actions list. Restores a deleted list; this action cannot be undone. Relevant for deleted lists.
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 Reading List in the row actions list for the course to which you want to add a reading list. The Course's Reading List page appears.

![Course's Reading List Page](image)

2. Select Add Reading List. The Add Reading List dialog box appears.

![Add Reading List Dialog Box](image)

3. Enter the reading list information. A description of the configurable fields appears in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code (Required)</td>
<td>The reading list code</td>
</tr>
<tr>
<td>Name (Required)</td>
<td>The reading list name</td>
</tr>
<tr>
<td>Status</td>
<td>The reading list's initial status. For a list of predefined reading list statuses, see Reading List and Citation Statuses in the Leganto Administration Guide. You can define other reading list statuses, see Configuring Reading List Statuses.</td>
</tr>
<tr>
<td>Due back date</td>
<td>The due back date for the course's resources. 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.</td>
</tr>
</tbody>
</table>

4. Select one of the following:
   - **Add** – Add the reading list and leave the dialog box open to configure additional reading lists.
   - **Add and Close** – Add the reading list and close the dialog box.

5. The new reading list appears in the Course’s Reading List page.
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.

For information about managing citations, see Managing Citations. This section presents how to edit general reading list information.

---

**Note**

- You can edit only reading lists that are unassigned or assigned to you.
- When you edit a reading list that is unassigned, it becomes assigned to you. To configure this, set the `rl_auto_assign` parameter; see Configuring Other Settings.
- While you edit a reading list, the reading list is locked and cannot be edited by other library staff.

---

**To associate a reading list with a course, or change or remove the association:**

---

**Note**

You can only change a reading list's course association if the list does not yet contain citations with approved copyright requests. For more about a citation's copyright status, see Managing a Citation's Copyright Status.

You can associate a reading list with multiple courses. Selecting **Associate this list with a course** opens the **Courses** tab of the Edit Reading List page. Selecting **Remove associated course** also opens the **Courses** tab of the Edit Reading List page, unless there is only one course associated with the list.

---

**Note**

- If you have Leganto, you can enable or disable the ability to associate a reading list with multiple courses. See Managing Multiple Courses for Reading Lists. When disabled, the workflow is slightly different: Select **Associate this list with a course** in the row actions list, select or search for the course to associate to the list in the dialog box, and select **Change Course Association**.

![Course Association Pane](image)

To remove a course association, select **Remove associated course** in the row actions list.

---

**To edit a reading list:**

On the Reading Lists Task List page (**Fulfillment > Course Reserves > Reading Lists**), select the reading list or select **Work on** in the row actions list. The **Citations** tab of the Edit Reading List page appears.
On this page, you can manage the reading list using the following actions:

- In the **Reading List Information** pane, you can edit the reading list parameters, including the **Code**, **Name**, **Status** (the reading list status), and (the default) **Due Back Date**. The reading list parameter fields are described in [Adding a Reading List](#).

  The sum total of all pages of all citations appears in this pane. The total includes the total pages of each citation that has pages defined. The total is determined from the **Start Page** and **End Page** fields in each citation; if either of these is not defined, the total is determined from the **Pages** field. Citations without pages, or whose pages cannot be parsed by Alma, are not included in the total.

- If your institution has Leganto enabled, you can perform the following Leganto-related tasks in the **Reading List Information** pane (for more information, see [Leganto Administration Guide](#)):
  - Edit the start and end date for the reading list's visibility (**Publication Status**) in Leganto, if it is shorter than the course’s active date range. The reading list is visible to students only between the indicated dates (if the list's **Publication Status** is not **Draft**). If you enter only a start/end date, then the list is visible only after/before the indicated date.
  - Edit the reading list's visibility (**Publication Status**) for Leganto (this is not the reading list status, but whether and how the list is visible to students in Leganto). The statuses are described in [Reading List and Citation Statuses](#) in the Leganto documentation.

**Note**

This setting does not affect the reading list's publication status in Primo.

- Select a creative commons license for the entire reading list, if your country supports this license type (see **copyright_region** in [Configuring Other Settings](#)). Also see [Configuring the Default Creative Commons Value for a Reading List](#).
- Lock/unlock the list in Leganto - Select **Locked in Leganto** to prevent any changes to the list in Leganto. Leganto users can still add a private note, like or add comments to citations, or mark a citation as read. The list can be unlocked in Alma by any librarian or in Leganto by the user who locked it.
- Open this reading list in Leganto - select **View in Leganto** in the page header.
- View the Reading List Advisor score (not shown above) and list owners.
- You can change the order of the citations in the list using the **Sort by** field. You can sort the citations by citation title...
After modifying the Edit Reading List page as required, select **Save**.

### 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](#)) or by the bulk items update job (see [Change Physical Items](#)). 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 the Add Reading List Fields table in [Adding a Reading List](#).

2. Citations are created in the reading list (see [Managing Citations](#)).

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](#).

If a reading list citation is linked to an item with a due back date earlier than its own due back date, the **Update move expiry** action in a row actions list on the List of Items page advances the item's due back date to the due back date of the citation's reading list. See [Working with the List of Items](#).
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 **Update move expiry** in a row actions list on the List of Items page (see [Managing Citation Fulfillment Options](#)), the due back date of Item A updates to April 1.

---

### Releasing and Reassigning a Reading List

Reading lists are assigned to Course Reserves Operators/Managers or Fulfillment Services Operators/Managers. You can release an assigned reading list that is assigned to you. This removes the reading list from your tasks.

**Note**

Only a manager (Course Reserves Manager or Fulfillment Services Manager) can view or reassign a reading list assigned to someone else. Operators can only view and reassign reading lists that are unassigned or assigned to them.

To release an assigned reading list:

On the Reading Lists Task List page (**Fulfillment > Course Reserves > Reading Lists**), select **Release assignment** in a row actions list.

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 **Reassign** in the row actions list for a reading list. The **Assign to** dialog box appears.

   ![Assign To Dialog Box](image)

2. In the **Assign to** drop-down list, select the user to whom you want to assign the reading list. Only users with the relevant roles appear in this list.
3. To notify the new assignee of the reading list task assignment, select **Send as e-mail**.
4. Optionally add a note to the new user.
5. Select **Assign To**. The user is assigned to work on the reading list.

---

### Managing Reading Lists in Bulk

You can edit reading lists in bulk using the **Reading List Bulk Update** job. For more information, see [Managing Search](#).

Ex Libris, a ProQuest Company
Queries and Sets to create a set of reading lists and then Running Manual Jobs on Defined Sets.

Also see Matching Reading List Citations to Inventory in Bulk and Rolling Over Courses.
Managing Citations

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

- Course Reserves Operator/Manager
- Course Reserves Viewer (read-only access)
- Fulfillment Services Operator/Manager

Citations refer to items that students must view or read for a course. Citations appear in reading lists; a course may have multiple reading lists.

Citations can be web sites, uploaded documents, or books or articles in either electronic or physical format. Book or article citations 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 website, or specific volumes, articles, or other identifiable parts of a periodical.

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**Note**

- 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, **Course information enrichment** must be selected in the Primo publishing profile.
- Adding or editing a citation may automatically trigger a purchase request (create a PO line); see Configuring Automatic Purchasing Requests from Citations.
- For information about Ex Libris’s reading list/citation management system, see the Leganto Administration Overview.
  - Citations added using the Alma UI or the Alma Web service API are added to the default section of a reading list (sections are relevant only in Leganto).
  - Citations of type **Note** (citations whose material type is set to **Note**) are added by instructors in Leganto. They are used to provide information to the students who are viewing the reading list, and do not need to be fulfilled by the library staff.

---

Citations can be linked to repository/inventory items or not. Titles not linked to the repository are typically articles or videos on external web sites or faculty resources that are not part of the institution’s inventory.

You manage reading list citations from multiple reading lists on the Edit Citations page (Fulfillment > Course Reserves > Citations), or from a single reading list on the Citations tab of the Edit Reading List page (Fulfillment > Course Reserves > Reading Lists; select the reading list or select **Work on** from the row actions list). Note that citations from archived reading lists do not appear on this page.

You can also access the Edit Citations page by searching for citations; see Searching in Alma.

You can also access the Edit Citations page with any of the citation tasks in the tasks list (see Tasks in the Task List). When accessed using the task list, one or more of the tabs and/or filters is pre-selected, according to the task you selected.
When editing citations, you can click the link following **Reading List** to access the Edit Reading List page. For more information about editing your reading list, see **Editing Reading Lists**.

On the Edit Citations page, the citations appear as a record list, with the most recently created citations appear first. If you are using Leganto, you can select a sorting option using the **Sort by** filter. On the Edit Reading List page, citations appear in the order specified in the parameter **reading_list_citation_order**. For more information, see **Configuring Other Settings**. Actions are available in several groups.

Alerts, inventory information, and additional citation information appear in tabs beneath each citation; these tabs are initially collapsed. Select a tab to expand or collapse the information. If you want all physical, electronic, or other inventory information to appear expanded by default for all reading lists, select the relevant option for **Expand**. You must re-select this every time you log in to Alma. To view physical items and holdings, select **Items** in the row actions list.

Notes left by users are shown in **Details** located in the **Alerts** tab of a citation's brief information as **Last comment**.

The following figure shows the notes shown in the Details section of the Alma Citation Brief in Alma.
The following figure shows the notes shown in the Details section of the Alma Citation Brief in Leganto.

![Notes Shown in Details in Alma Citation Brief Information in Leganto](image)

For more information about record lists, and for information about how to configure the arrangement of the fields and citation actions, see [Record Lists](#).

The citation tabs in each row are:

- **Physical, Electronic, Digital** - See [Viewing Inventory/Other Details](#). The physical tab includes the physical resource's call number (shelf number).
- **Other** - Other methods of viewing the citation source material, which includes (where relevant) OpenURL link resolver link, link to the uploaded file, or the original source or URL of the citation. A green dot appears in the tab if there is at least one method.
- **Citation Details** - Additional citation details, some of which may have originated from the repository item to which the citation is linked. See [Viewing information about a citation](#).
- **Alerts** - Any alerts related to this citation. The number of alerts appears in the tab header. Select **Delete** to delete an alert, when available.
- **More Info** - Additional information, including repository item title, related records, orders related to this item, requests or work orders related to this item, and a link to the courses in which this item is in demand as a citation. See [Viewing information about a citation](#).

---

**Note**

(Leganto only) This tab does not yet support reading lists associated with multiple courses. If the citation is associated to a reading list that is associated to multiple courses, the value for the **Courses** field may be incorrect.

---

Actions to perform on this page:

- You can filter the list of citations using filters (Edit Reading List page) or facets (Edit Citations page):
  - **Alerts** - Alert type connected with the citation (see [Removing alerts from citations](#)).
  - **Citation Status** - Citation (fulfillment) status of the citation. See [Reading List and Citation Statuses](#). Not Complete matches any citation whose status is not Complete.
  - **Resource Locate** - Resource locate status of the citation. See [Managing a Citation's Attachment to an Inventory Item](#) (resource locate).
- **Material Type** - Primary or material type of the citation
- **Tags** - A tag set on the citation (appears as *Section Tags* and *Citation Tags* on the Edit Citations page; see *Adding Citation Tags*)
- **Copyright Status** - The copyright status of the citation (see below)

The following filter options is only available on the *Edit Reading List* page:

- **Citation Last Modification Date** (Leganto) - Enter a range of dates to match citations whose last modification is between these dates.

The following filter options are only available on the *Edit Citations* page. In addition, you can sort the citations on this page by last created date, last modification date, reading list name, or citation title.

- **Course Status** - *Active* or *Inactive*. If you are using Leganto and have enabled multiple courses for reading lists, the status matches a citation if any of its associated courses match the selected value.
- **Processing Department** - *Undefined* matches any citation from a reading list that does not have an associated course.
- **List Status** (Leganto) - The reading list's status
- **List Assigned to** - The user to whom the reading list is assigned.
- **Publication Status** (Leganto) - The publishing status of the reading list. See *Reading List and Citation Statuses*.
- **License Type** (Leganto) - Self-declared, CLA, CCC, and so forth.

- To manage multiple (one or more) existing citations, select the check boxes next to the desired citations, or select the *Select All* check box, and then select one of the top actions on the page.
  - The citation status drop-down list - See *Changing a citation's status*.
  - **Change Status** - See *Changing a citation's status*.
  - **Change Copyright Status** - See *Manually Managing a Citation's Copyright Status*.
  - **Remove Alerts** - See *Removing alerts from citations*.
  - **Remove Citations** - See *Removing citations*.

  The following actions are only available on the *Edit Reading List* page:

- **Print Slip** - See *Printing Slips for Citations or Generating a Citation Print Slip Report*.
- **Print Slip Report** - See *Printing Slips for Citations or Generating a Citation Print Slip Report*.
- **Place Request** - See *Creating requests for citations*.

- To manage a single existing citation, select one of the citation actions. The available actions depend on various factors, as described below.
  - **Edit** - See *Editing a citation*.
  - **Resource Locate** - See *Managing a Citation's Attachment to an Inventory Item*.
  - **Set Complete** - See *Changing a citation's status*.
  - **Manage Fulfillment Options** - See *Managing Citation Fulfillment Options*.
  - **Purchase Request** - See *Creating requests for citations*.
  - **Resource Sharing Request** - See *Creating requests for citations*.
  - **Portfolio List** - See *Viewing information about a citation*.
  - **Items** - See *Viewing information about a citation*.
  - **Remove** - See *Removing citations*.
  - **Duplicate** - See *To add a citation by duplicating an exiting citation* in *Adding Citations to a Reading List*.
  - **Print Slip** - See *Printing Slips for Citations or Generating a Citation Print Slip Report*.
  - **Detach from Repository** - See *Managing a Citation's Attachment to an Inventory Item*.
The following list presents the tasks associated with managing citations, and where to find more information.

### Managing Citations Tasks

<table>
<thead>
<tr>
<th>Action</th>
<th>Procedure</th>
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<tbody>
<tr>
<td>Adding a citation</td>
<td>See <a href="#">Adding Citations to a Reading List</a></td>
</tr>
<tr>
<td>Viewing information</td>
<td>• Brief citation information appears in the list of citations. To view additional information about a citation, select one of the tabs beneath the citation. In addition to self-explanatory information, the information includes.</td>
</tr>
<tr>
<td></td>
<td>• Section name - This refers to the reading list section, which is relevant only in Leganto.</td>
</tr>
<tr>
<td></td>
<td>• Subject - This is according to the bibliographic record, not the reading list subject tag, if any.</td>
</tr>
<tr>
<td></td>
<td>• Citation status (request status) - See the list of statuses for a reading list in <a href="#">Adding a Reading List</a>.</td>
</tr>
<tr>
<td></td>
<td>• Resource locate status - Whether the citation is matched to an inventory item. See <a href="#">Managing a Citation's Attachment to an Inventory Item</a>.</td>
</tr>
<tr>
<td></td>
<td>• Copyright status - See <a href="#">Managing a Citation's Copyright Status</a>.</td>
</tr>
<tr>
<td></td>
<td>• License Type - Appears if the type is CLA, CCC, a creative commons type (varies by region), or self-declared.</td>
</tr>
<tr>
<td></td>
<td>• DCS status - Appears if a DCS request was made for this citation. See <a href="#">Attaching a Citation to the CLA Digital Content Store (UK Only)</a>.</td>
</tr>
<tr>
<td></td>
<td>• Course name / Reading List - Appears on the Edit Citations page, only.</td>
</tr>
<tr>
<td></td>
<td>• Citation tags - See <a href="#">Adding Citation Tags</a>, below.</td>
</tr>
<tr>
<td></td>
<td>• Whether the citation is also in other reading lists</td>
</tr>
<tr>
<td></td>
<td>• <a href="#">Demand in Other Lists, Same Course</a> - Other reading lists in this course also list the resource linked to this citation</td>
</tr>
<tr>
<td></td>
<td>• <a href="#">Demand in Other Lists, Other Courses</a> - Other reading lists in other courses also list the resource linked to this citation</td>
</tr>
<tr>
<td></td>
<td>Select to open the Manage Resource Options page with the Course Information tab pre-selected; see <a href="#">Managing</a></td>
</tr>
</tbody>
</table>
### Action Procedure

**Citation Fulfillment Options.**

- Alerts about the citation (see Removing alerts from citations)
- To view a citation’s items or portfolios, select the **Items** or **Portfolio List** citation action. The **List of Items** or **Portfolios List** page appears. For more information about the List of Items page, see Working with the List of Items. For more information about the Portfolios List page, see Working with the Portfolio List.
- (Leganto only) To view the original source of a citation, select the URL in the **Other** tab. This URL appears if Source is defined for the citation.
  - For citations added using Cite It, this is the original URL of the citation.
  - For citations added from Primo Central records, this is the uResolver link provided from Primo Central (the uResolver URL that is used for availability). To debug this link, see the knowledge article Debugging Citation uResolver Links.
  - For all other citations, the source field is not defined.
- To view the uploaded file of a citation, select the file name in the **Other** tab. This link appears only if an uploaded file exists.
- To view the OpenURL link resolver results of an article or a digital object, select the link in the **Other** tab. For an article, this link appears if the link resolver found at least one matched resource. For a digital object, this link appears if there is an associated digital object. If you are using Leganto, you can turn off link resolving for all article citations using a customer parameter; see Adding Citations to a Reading List.
- (Note: The following procedure is temporarily disabled) For CLA-enabled institutions in the UK, to view a popup with copyright information about the citation retrieved from the CLA, select the **Check CLA Permissions** citation action. A popup with the information appears. Select the type of work you intend to perform in the drop-down at the top of the popup.

To enable CLA, set copyright_region to UK, see Configuring Other Settings.

<table>
<thead>
<tr>
<th>Action</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Editing a citation</strong></td>
<td>You can edit a citation, for example to improve its metadata.</td>
</tr>
<tr>
<td></td>
<td>To edit a citation, select the <strong>Edit</strong> citation action. The Edit Reading List Citation page appears. Modify the information in the <strong>Citation</strong> tab and other tabs as required, and select <strong>Save</strong>. For information on the fields in the <strong>Citation</strong> tab, see Adding Citations to a Reading List. If you selected Copyright Auditing Required and would like to navigate immediately to the Approval Requests List, select <strong>Save and manage approval</strong>, instead.</td>
</tr>
<tr>
<td></td>
<td>If you edit any of the active fields listed in the Match by Fields table (see Configuring Citation Matching Criteria), you are prompted to perform a new resource locate. If the citation was previously located, and the new locate process does not find a match, the citation is detached from the repository. If your institution is implementing Leganto, see Configuring Repository Locate Workflow for information about configuring this workflow. If the citation is detached from the repository, citation_detached_from_repository is triggered; see Configuring Default Statuses for Citations/Reading Lists.</td>
</tr>
<tr>
<td></td>
<td>Add, edit, or delete notes in the <strong>Notes</strong> tab. For more information about this tab, see Notes Tab. Select an option in the <strong>Update Notes</strong> table action to mark notes as unread (Activate Notes) or read (Dismiss Notes). When you add a library note type, only other librarians can see the note. When you add an instructor type note, also instructors can see the note, in Leganto (Leganto users only). You cannot change the note type after creating the note.</td>
</tr>
<tr>
<td><strong>Adding citation tags</strong></td>
<td><strong>Public</strong> tags appear when a patron views the citation in Leganto (Leganto customers only) and Primo. <strong>Instructor-Library</strong> tags are viewable by librarians, and, in Leganto, by instructors creating the reading list. <strong>Library-Internal</strong> tags are visible only in Alma by librarians. <strong>Internal</strong> tags are added by Leganto or Alma, are visible by librarians (and instructors in Leganto), and cannot be added, edited, or removed. They are typically the result of a Leganto or Alma feature.</td>
</tr>
<tr>
<td></td>
<td>To add or edit citation tags, select the <strong>Tags</strong> tab while editing a citation, add or delete tags as required, select <strong>Save</strong>, and select <strong>Go</strong>. You can filter using these tags on the Edit Reading List page. To configure the available citation tags and their type, see Configuring Citation and Section Tags.</td>
</tr>
<tr>
<td>Action</td>
<td>Procedure</td>
</tr>
<tr>
<td>--------</td>
<td>-----------</td>
</tr>
<tr>
<td>Managing a citation's attachment to an inventory item</td>
<td>See <a href="#">Managing a Citation's Attachment to an Inventory Item</a>.</td>
</tr>
<tr>
<td>Managing a citation's fulfillment options</td>
<td>See <a href="#">Managing Citation Fulfillment Options</a>. To see alternate edition suggestions for citations, run the <a href="#">Citation Alternate Suggestions job</a>.</td>
</tr>
<tr>
<td>Attaching citation attributes to a citation</td>
<td>See <a href="#">Attaching Citation Attributes to Citations</a>. Also see <a href="#">Editing a citation</a> above for adding tags to a citation.</td>
</tr>
<tr>
<td>Printing slips for citations</td>
<td>See <a href="#">Printing Slips for Citations or Generating a Citation Print Slip Report</a>.</td>
</tr>
<tr>
<td>Changing a citation's status</td>
<td>Changing a citation status does not change the reading list status, and vice versa. A citation status is also different from the citation resource locate status. To change citation statuses, select the citations, select the status from the drop down to the left of the Change Status top action, and select Change Status. Alternately, to set a single citation's status to complete, select the Set Complete citation action. Alma comes with predefined statuses that cannot be changed. For information on configuring additional citation statuses, see <a href="#">Configuring Reading List Citation Statuses</a>. For the default list of citation statuses, see <a href="#">Reading List and Citation Statuses</a> in the Leganto Administration Guide.</td>
</tr>
<tr>
<td>Changing a citation's copyright status</td>
<td>See <a href="#">Managing a Citation's Copyright Status</a>.</td>
</tr>
<tr>
<td>Changing the representations that appear for a digital citation in Leganto</td>
<td>(Leganto only) See <a href="#">Managing a Citation's Digital Representations</a>.</td>
</tr>
<tr>
<td>Creating requests for citations</td>
<td>You can place institution requests on one or more citations in order to move the items (permanently or temporarily) or to...</td>
</tr>
</tbody>
</table>
digitize them. You might place a bulk move request if, for example, the reading list's due-back date changes. To create a bulk requests, select the citations and select the **Place Request** top action. The Create Request page appears (see Create Request Page). Select a request type, fill in the remaining fields (as described in Creating a Request), and select Submit.

The requests are:

- **Library physical digitization request** - Only one open digitization request can exist for a citation. For information about digitization see Digitization Processing.
- **Move permanently**
- **Move temporarily**

When enabled for your institution by Ex Libris, you can create a purchase request directly from a citation. To create a purchase request for a citation, select the **Purchase Request** citation action. For more information see Purchase Requests.

When enabled for your institution by Ex Libris, you can create a resource sharing borrowing request directly from a citation. To create a resource sharing borrowing request for a citation: select the **Resource Sharing Request** citation action. The Resource Sharing Borrowing Request form appears. For more information see Creating a Borrowing Request. The form is prefilled with the citation information, as well as the parameter values of parameters starting with `citation_rs_default_`; see Other Settings.

<table>
<thead>
<tr>
<th>Removing alerts from citations</th>
</tr>
</thead>
</table>

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 Managing Citation Fulfillment Options.)

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**). An alert also appears if an instructor added a library note to the citation or marked a resource link as broken in Leganto.

The possible alerts are:

- Citation Resource Sharing Request Created
- Citation Resource Sharing Request Received
- Citation Resource Sharing Request Rejected
- Citation Resource Sharing Request Sent
- Citation Purchase Request Approved
- Citation Purchase Request Rejected
- Citation Purchase Request Submitted
- Citation Move Request In Process
- Citation Move Request Cancelled
- Citation Move Request Completed
- Citation Digitization Request In Process
- Citation Digitization Request Cancelled
- Citation Digitization Request Completed
- Citation has a New Note
- Citation Link Reported as Broken (Leganto only; see Enabling Broken Link Reporting)
- DCS extract creation failure - When DCS returns a failure. See Attaching a Citation to the CLA Digital Content Store (UK Only).
- List has a New Note (appears only in the facet on the Reading List Tasks List page)
Action | Procedure
--- | ---
To remove alerts from citations, select the citations, select the **Remove Alerts** top action, select the alert type (or **All**), select **Remove Alerts**, and select **Confirm** in the confirmation dialog box.

**Note**

If you are implementing Leganto, the alerts **List was published/unpublished** are special, non-workflow alerts that appear only in a facet on the Reading List Tasks List page when an instructor publishes/unpublishes the reading list in Leganto.

Removing citations | Select the citations and select the **Remove Citations** top action. Select **Confirm** in the confirmation dialog box. Alternately, select the **Remove** citation action.

---

**Adding Citations to a Reading List**

Add a citation using one of the three workflows or by duplicating an existing citation and editing the copy.

**Note**

You can also create a citation 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**.

---

**Adding an Item or Citation to My Collection from the Menu**

To add an item or citation to My Collection from the menu:

1. At the reading list, section, or citation level, click the ellipsis and select **Import**. The export **Type** drop down menu is displayed.

   ![Import menu](image)

   **Creating New Lists Using Additional Formats**

2. Select an import type.
3. Drag files or browse your hard drive to import a file or folder.
4. When you have included all of the required files, click **Create**.
5. Define the reading list Title.
Defining New Reading List Title

Your new list is created with a default section that you need to edit.

Default Sections in New Reading List

Importing a folder extracts the metadata from files located in the folder you selected.

Importing a Folder

Note

You can abort all uploads by clicking Abort all uploads, or abort individual uploads.

Adding a Citation Already in the Repository

To add a citation already in the repository:

1. On the Edit Reading List page (Fulfillment > Course Reserves > Reading Lists; select the reading list) in the Citations tab, select the Add Repository Citation add action. The Repository Search page appears.
2. Search for a title; see Searching in Alma.
3. Select one or more titles to add and select Select. The items are added as citations.

To add copyright clearance information or to configure other citation information (see To add a citation that is not in the repository (without adding it to the repository), you must edit the citation after adding it. See Editing a Citation.

Adding a Citation Not in the Repository Without Adding it to the Repository

Non-repository citations allow you to represent items that are not part of the library's resources and therefore are listed only in Course Reserves. For more information, see Non-Repository Citations.

---

**Note**

Since non-repository citations are not published, they will not appear in Primo and Primo VE.

---

To add a citation that is not in the repository (without adding it to the repository):

1. On the Edit Reading List page (Fulfillment > Course Reserves > Reading Lists; select the reading list) in the Citations tab, select the Add Non-Repository Citation add action. A dialog box to select the citation type appears.
2. Select the type of citation (book or article) and select Choose. The Edit Reading List Citation page (for non-repository citations) appears, containing the fields for the selected citation type (see the following images).

![Edit Reading List Citation Page (for non-repository citations) for a Book](image-url)
3. In the Resource Information area, enter the necessary information in the fields. A description of the fields appears in the Resource Information Fields table in Adding a New Book or Journal Article.

Note
A citation's call number refers to the Library of Congress call number (field 050), which is not necessarily the call number associated with the citations associated physical resource, which is its shelf number.

4. If you are using Leganto, then in the Additional Resource Information area, you can manually add additional sources for the citation (in addition to the source in the Resource Information area). These links appear in the Links & Availability section when viewing a citation in Leganto.

5. In the File Upload area, select a file for the citation, if relevant. For example, an image for a digital citation or a PDF for a document. You can only upload one file. A progress bar appears while the file is uploading. To view the uploaded file, select the file name (if you are editing this page at a later time, select Download File in the row actions menu). To delete the file, select Delete in the row actions menu (if you are editing this page at a later time, select Delete in the row actions menu). The label field currently has no effect
6. In the **Copyright Attributes** tab (edit only):
   ◦ For more information on the **Copyright Status** field, see *Manually Managing a Citation's Copyright Status*. When using Leganto, an administrator can make the **Source for Copyright** field mandatory and select its default value, see *copyright_source in Configuring Leganto Copyright-Related Procedures*.
   ◦ Select **Copyright Auditing Required** to add intended usage information and have Alma manage the citation's copyright status automatically (see *Automatically Managing a Citation's Copyright Status*). When selected, fill in the additional fields that appear. For information on most of these fields, see *staff digitization request in Creating a Request*.

7. In the **Citation Parameters** area, optionally select:
   ◦ **Disable Resolving** (Leganto only, appears for article citations added using Cite It! with library coverage) - Select to hide the OpenURL link resolver results for a citation from Leganto users. Instead of a dropdown, only a **View** link appears in Leganto for this citation. For additional information, see *Disabling Availability Links for Primo Central Records with No Full Text*.
   ◦ **Material Type** - Select an available option. This list can be configured in the Reading List Citation Secondary Types table. See *Configuring Citation Material Types*. This list is not the same as the one described in *Configuring Physical Item Material Type Descriptions*.
   ◦ If you have not already selected a copyright clearance type (self-declared, Creative Commons, and so forth), you can select a Creative Commons clearance in the **Creative Commons License** field. The options available in this field depend on the customer parameter **copyright_region**; see *Configuring Other Settings*. For more information about Creative Commons, see [here](#).
   ◦ In **Resource Locate Status**, you can manually select a resource status; see *Managing a Citation's Attachment to an Inventory Item*.
   ◦ In **Originating System ID**, you can optionally enter the ID that this resource had in a previous system if the record was migrated to Alma; see *Managing a Citation's Attachment to an Inventory Item*.
   ◦ **Public Note** (Leganto customers only; edit only) - Edit a public note that appears in Leganto, if relevant.
   ◦ **Due Date** - Enter the date by which students should read/view the materials.

8. Select **Save** or **Save and Manage Approval**, and select **Go**. The new citation appears on the Edit Reading List page.

   Alma checks if a single inventory item matches the citation, and if so the citation is automatically linked to that inventory item. You can select **Detach from Repository** to remove this attachment. See *Managing a Citation's Attachment to an Inventory Item*. You can turn this feature off using the **reading_list_auto_locate_citation_upon_creation** customer parameter; see *Configuring Other Settings*.

   If you select **Save and Manage Approval**, the Approval Requests List appears. For more information, see *Approving/Rejecting a Request for Digitization*.

   If you are editing the citation, you can also select **Save and Activate Notes**. See *Editing a Citation*. 

---

**Note**

- When a file is uploaded to a citation whose status is **Complete**, if the copyright clearance is not self-declared, Creative Commons, or otherwise already approved, the citation's status is reset to **Being Prepared**.
- The file may be of any type. There is no file size limit for librarians. (For the instructor file size limit in Leganto, see *Configuring File Upload in Leganto*.)
9. Optionally select the Resource locate citation action on the Edit Reading List page to locate a resource for the new citation. For more information, see Managing Citation Fulfillment Options.

---

Adding a Citation Not in the Repository While Adding it to the Repository

To add a citation that is not in the repository and also add it to the repository:

1. On the Edit Reading List page (Fulfillment > Course Reserves > Reading Lists; select the reading list) in the Citations tab, select the Add Brief citation action.

2. In the dialog box that appears, select the type of citation you want to create—physical book/article or electronic book/article—and select Choose. The Quick Cataloging page appears.

3. Configure resource and item information (for information on the fields, see Adding a New Book or Journal Article). In the Citation Parameters area, optionally select the Copyright Status (for more information, see Changing a citation’s copyright status in the above table) and Material Type from the available options.

4. Select Save. New inventory is created and the new citation appears in the Citations tab of the Edit Reading List page.

To add copyright clearance information or to configure other citation information (see To add a citation that is not in the repository (without adding it to the repository), you must edit the citation after adding it. See Editing a Citation.

---

Note

The course_restricted_bib_data_will_be_deleted parameter (see Configuring Other Settings) determines whether the published course data created in this process is deleted (true) or suppressed (false, by default) from Primo when the course becomes inactive.

If you have enabled the RFID integration profile (see RFID Support), you can select Write to RFID and Save to save the new inventory to RFID.
Contributing Instructor Resources to a Reading List

Alma permits instructors to lend their personal copies of items to the library for circulation. This allows the library to catalog instructor-owned copies, track which instructor owns the item, and re-use previous items easily in subsequent terms.

When enabled, library staff can indicate that an item is a personal copy when creating a Brief Citation (Add Citation > Add Brief) and enter the instructor’s name. Alma will store information about all instructor-owned copies using dedicated personal copy locations. Locations in the library are automatically created when the instructors’ copies are cataloged, with one location per instructor. All items deposited by the instructor will be created in that same location.

Personal copy locations indicate that the items are owned by the instructor, and also allow the library to track items that are not physically in the library at that time, but rather, in the instructor’s possession. All personal copy locations and the items in them will be suppressed. When the instructor lends the item to the library, the item can be moved to a temporary location representing a non-personal copy location in the library, where it will circulate according to standard fulfillment rules. For example, library staff may move the item to the temporary location of “Course Reserves” with a due back date of the end of the term. The item will temporarily circulate as part of the library collection, but with the instructor’s name stored as the permanent location, indicating the person to which the item should be returned at the end of the term.

When the item is moved back to its permanent location, which is the personal copy location, it will automatically be suppressed. The item can then be returned to the instructor, but the record does not need to be deleted and can be easily re-used in subsequent terms by following the workflow above.

To enable this feature, configure the following parameters:

- **Personal copy library:** To enable the `personal_copy_library` flag (Fulfillment > General > Other Settings) you must enter a library code as the parameter value, such as MAIN. This code corresponds to the library where the personal copy locations will be created.

- **Personal copy fulfillment unit:** To enable the `personal_copy_fu` flag, you must enter a fulfillment unit code as the parameter value. Fulfillment terms for items in the instructor-owned locations are determined by the rules set in this Fulfillment Unit. Keep in mind that the intended workflow is that items in an instructor location are not currently part of the library collection and are physically stored with the instructor.

To contribute instructor resources to a reading list:

1. Open the Reading Lists Task List page (Fulfillment > Course Reserves > Reading Lists).
2. Select a citation code.
3. Select Add Citation and select Add Brief.

4. Select Physical Book and select Choose.

5. Specify all necessary fields for the item (such as Title). For more information, see Managing Physical Resources.

6. In the Item Information section, specify the following fields:
   - **Personal copy** – Select this field to enable the Personal copy of field.
   - **Personal copy of** – Specify the instructor's name, which will be used for the item's location.

7. Select Save. The book item is created and displayed in the Physical tab.

8. Continue with the fulfillment process.

---

**Adding a Citation by Duplicating an Existing Citation**

To add a citation by duplicating an existing citation:

On the Edit Reading List page (Fulfillment > Course Reserves > Reading Lists; select the reading list) in the Citations tab, select the Duplicate citation action. The Edit Reading List Citation page appears. Modify the parameters as needed and save the new citation. See the above add procedures for details.

If you are using Leganto, you can add a citation that is an alternative format or edition of an existing citation. See Configuring the Display of Other Formats and Editions of Citations.

---

**Managing a Citation's Attachment to an Inventory Item**

When you create a citation, you can create it attached to an already existing physical inventory item, or you can create the inventory item at the same time and have the citation attached to the new inventory item.

Alternately, you can create a citation without an attachment to an inventory item. When you create a citation without any attachment to an inventory item, Alma tries to locate a matching inventory item. If a single item is discovered, Alma automatically attaches the citation to the inventory item. For more information, see Configuring Citation Matching Criteria.

You can turn this feature off using the reading_list_auto_locate_citation_upon_creation customer parameter; see Configuring Other Settings.

New for November! You can configure Leganto to locate citations based on any or all the fields indicated in the Locate Citations By Fields mapping table (Fulfillment Configuration > Courses > Locate Citation By Fields), using the new resource_locate_mode field in the Other Settings table (Fulfillment Configuration > General > Other Settings).

- If you set the value of the resource_locate_mode field to "OR", then Leganto will locate citations based on any of the fields in the Locate Citations By Fields mapping table.
- If you set the value of the resource_locate_mode field to "AND", then Leganto will locate citations based on all of the fields in the Locate Citations By Fields mapping table.

New for November! You can also configure Leganto to locate citations based on specific material types, by entering in the codes for the material types into the new resource_locate_by_type field in the Other Settings table (Fulfillment Configuration > General > Other Settings), separated by commas. For more information, see Configuring Other Settings.

When attaching a citation to an inventory item, Alma adds missing information to the citation; for more information, see...
Repository Fields Used to Overwrite Citation Fields in the Leganto Administration Guide. You can change how the mapping works; see Mapping Bibliographic Record Fields to Citation Fields.

---

**Note**

- If the article is in a journal held by the library, in order for the article information to appear in Primo, the information must be in the inventory record attached to the citation (the MMS record); the citation information is not published to Primo.
- (Leganto only) Alma may be configured to overwrite citation information added from Cite It! See Configuring Repository Locate Workflow.
- Note that the process of attaching a citation to a physical item in the inventory has nothing to do with OpenURL link resolving for an electronic article, which is about finding links to external instances of the article. However, ...
- ... although attaching a citation to inventory is for physical items only, a citation's locate status also reflects whether the OpenURL link resolver is able to locate an electronic article for the citation. A citation is located if Alma finds a physical and/or electronic resource for the citation. The bulk location job described in Process and Enrich Citations in Bulk also checks the link resolver for this purpose.
- This job also validates URL citations by attempting to access the URLs and checking for valid HTTP responses.

---

To remove this attachment, select the **Detach from Repository** citation action. After performing this action, the citation is not connected to any inventory.

If you have detached the citation from an inventory item, or the inventory could not be located automatically, you can try to attach the citation to an inventory item manually. To do this for one citation, see below. To do this in bulk, see Process and Enrich Citations in Bulk.

See also Finding Alternate Resource Suggestions for Citations.

A citation's resource locate status indicates the status of this process. The possible resource locate statuses are:

- **Information Incomplete** - Not enough information was entered to perform a resource locate. The minimum information is a) ISSN, volume, issue, start page, and publication year, or b) ISBN, or c) DOI.
- **Locate Failed** - A locate was attempted but failed to complete for some reason.
- **Locate Not Run** - A locate was not attempted.
- **Multiple Resources Located** - A locate was attempted and multiple resources were found.
- **No Resource Located** - A locate was attempted but no resource was found.
- **Not Complete** - A locate attempt is in process.
- **Resource Located** - A locate was attempted and a single resource was found.

If for some reason you want to set the resource locate status manually, you can do so when adding or editing the citation on the Edit Reading List Citation page; see Adding Citations to a Reading List.

**To locate a resource manually:**

On the Edit Reading List page (Fulfillment > Course Reserves > Reading Lists; select the reading list) in the Citations tab, select the **Resource Locate** citation action. Alma attempts to locate inventory that matches the citation and if a single inventory match (in any format) is found, Alma attaches it automatically.

If Alma could find no matches, Alma displays a page allowing you to edit the search criteria. If Alma finds multiple matches, Alma displays a screen enabling you to select one of the matches and/or edit your search criteria. For more information, see Searching in Alma.
Managing Citation Fulfillment Options

To check how the citation can be made available to students, on the Edit Reading List page (Fulfillment > Course Reserves > Reading Lists; select the reading list) in the Citations tab, select the Manage Fulfillment Options citation action.

• 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 below.)
  
  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.

• If the inventory items are geographically nearby and/or you have access to them, you can fetch the items from the shelves by selecting the Print slip citation action to print a slip for the specific citation. Use the Change Item Information tab to temporarily change the item location, as described in Changing Item Information.

• If the item is not in your library's inventory, or if you would like the library to purchase additional copies, consider making a purchase request by selecting the Purchase Request citation action. For more information, see Purchase Requests.

To manage fulfillment options for a resource:

On the Edit Reading List page (Fulfillment > Course Reserves > Reading Lists; select the reading list) in the Citations tab, select the Manage Fulfillment Options citation action. The Manage Resource Options page appears with the Resource Options tab pre-selected.

The link is available only if a resource was specified.
The summary header includes information about the resource, including title, author, ISBN/ISSN, and so forth, as well as any alerts on the citation. The following fields appear on this page:

### Manage Resource Options Page Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Course Information Tab – Course Information</strong></td>
<td></td>
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<tr>
<td>Course Code</td>
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<tr>
<td>Section</td>
<td>The course section</td>
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<tr>
<td>Course Name</td>
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<tr>
<td>Number of Participants</td>
<td>The number of participants in this course</td>
</tr>
<tr>
<td>Reading List Name</td>
<td></td>
</tr>
<tr>
<td>Campus</td>
<td></td>
</tr>
<tr>
<td>Demand for X courses with overall Y participants</td>
<td>The number of participants in all courses in which this citation appears</td>
</tr>
<tr>
<td><strong>Course Information Tab – This Record in Other Lists – Information about the bibliographic record of the citation as it appears in other reading lists. See actions for this area below.</strong></td>
<td></td>
</tr>
<tr>
<td>Course Code</td>
<td>Course code of the other reading list</td>
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<tr>
<td>Course Name</td>
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<td>Section Id</td>
<td>The course section</td>
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<td>Academic Department</td>
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<tr>
<td>Processing Department</td>
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<tr>
<td>Instructor</td>
<td>The reading list owner, or <strong>Multiple</strong> if there are multiple owners.</td>
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<tr>
<td>Start Date</td>
<td>The start date for this course</td>
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<tr>
<td>End Date</td>
<td>The end date for this course</td>
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<tr>
<td>Number of Participants</td>
<td>The number of participants in this course</td>
</tr>
</tbody>
</table>
### Field Description

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<th>Field</th>
<th>Description</th>
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<td>Citation Status</td>
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</tbody>
</table>

**Resource Options Tab – Electronic Services – Electronic fulfilment information for the citation**

**Resource Options Tab – Digital Services – Digital fulfilment information for the citation**

**Resource Options Tab – Physical Services – Physical fulfilment information for this citation. See actions for this area below.**

**Resource Options Tab – Requests existing – Requests for the bibliographic record associated with this citation. Some requests are specific to a reading list. Select the reading list from Filter Requests By Records in Other Lists filter to view only requests for that reading list. For more information about the fields and actions in this section, see Managing Requests and Work Orders.**

The following actions are available for physical services:

- View the items – Select View items in the row actions list. The List of Items page appears; see Working with the List of Items.
- Create a request – Select Request in the row actions list, or select Place Request in the top actions list. The Create Request page appears (see Creating a Request). Select a request type (as described in Creating a Request) and select Submit.
- 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 Update move expiry in the row actions list, or select Update Move Expiry in the top actions list. You can also manually update a citation’s due back date when adding or editing a citation; see Adding Citations to a Reading List.

If any requests are active for the resource, including any initiated by an instructor in Leganto, they appear in the Requests area. While a work order operator can approve or reject requests on the Approval Requests List page (see Approving/Rejecting a Request for Digitization), you can edit or cancel the request in this area. This area presents a record list; for more information about these lists, see Record Lists.

The actions available for each request are:

- **Cancel** – Cancel the request. You are asked to confirm with the following options:
  - Cancellation reason – Select the reason for the cancellation.
  - Cancellation note – Add an optional note.
  - Notify user – If you do not select this, the cancellation note and reason is store in Alma but not sent by email to the user. Select this to send a note to the user about the cancellation.
  - Keep citation’s copyright information (if this was a DCS request, the field is Keep citation’s DCS request) – Select this to preserve any copyright record / request / DCS request that was made simultaneous with the digitization request. Clear this to also remove the copyright record or request. For more information on DCS requests, see Attaching a Citation to the CLA Digital Content Store (UK Only).
- **Print Slip** – Print the request to the default printer.
- **Edit** – Edit the request. You cannot change the request type.
- **Update Expiry** – Edit the request's expiration date.
- **Mark as Missing** – Mark the item associated with the request as missing.
- **View Title in Search** – Search in Alma for the resource title.
- **View Audit Trail** – See history related to the resource on the Request Processing Audit Trail page.
• **Change to Electronic Digitization** – Change 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** - Change 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.

The following actions are available for citations that also appear in other reading lists:

• View the other reading list – Select **View** in the row actions list. The other reading list appears.

• Create a request for the other reading list – Select **Place Request** in the row actions list. The Create Request page appears (see Create Request Page). Select a request type (as described in Creating a Request) and select **Submit**.

---

### Managing a Citation's Digital Representations (Leganto Only)

By default, all digital representations appear in Leganto for citations attached to digital resources. This is because the customer parameter `display_digital_representations` is set to `true` by default; see Configuring Digital Representation Display Options. When this parameter is set to `false`, no representations appear unless you configure them to: the citation action **Manage Digital Representations** appears on the Edit Reading List page for these types of citations. You must manually select which representations you want to appear in Leganto.

To select which representations appear when representations do not appear by default:

1. On the Edit Reading List page (Fulfillment > Course Reserves > Reading Lists; select the reading list) in the Citations tab, select the **Manage Digital Representations** citation action. The Digital Resource Editor page appears. For more information, see Editing Representation Metadata and Content. Each representation appears with a check box.

2. Select the check boxes for the representations that you would like to appear in Leganto and select **Select**. The selected representations appear in Leganto.

---

### Attaching a Citation to the CLA Digital Content Store (UK Only)

If you are a UK customer (set `copyright_region` to `UK`, see Configuring Other Settings), and have implemented a Digital Content Store (DCS) integration profile (see Integrating with the UK's Digital Content Store (DCS)), you can manage the citation's attachment to a DCS item.

To automatically attach a citation to the DCS store:

1. On the Edit Reading List page (Fulfillment > Course Reserves > Reading Lists; select the reading list) in the Citations tab, select the **Associate to DCS** citation action. The DCS Search page appears with the matching item or a list of matching items.

2. If required, use the secondary search to search for all or part of an author, title, DCS item ID (GUID), or identifier (ISBN / ISSN).
3. The next step depends on whether you already have a digital copy of the material:

1. If a digital copy already exists in the DCS and is approved, find the required item and select Associate in the row actions list. The citation is attached to the selected item and additional citation actions become available.

2. If you have a digital copy of the material but have not uploaded it to the DCS, select Copyright and complete a copyright request (see Automatically Managing a Citation's Copyright Status). The request goes through your institution’s copyright rules (see Configuring Digitization and Copyright Rules), which may automatically send the request to the DCS. Log in to the DCS, create or locate your request, and upload the digital copy.

3. If you do not yet have a digital copy, but the citation has a valid MMS ID, select Digitization and place a digitization request (see Creating a Request). The request goes through your institution's digitization and copyright rules (see Configuring Digitization and Copyright Rules), which may automatically send the request to the DCS. After you have a digital copy, log in to the DCS, create or locate your request, and upload the digital copy.

When a DCS request is in process, you see its status in DCS Status as well as an internal tag. Select the row action Remove DCS to remove the request. This status is updated daily based on a scheduled job (DCS Synchronize). You can select Update DCS Status to update the status of the request manually.

When a DCS request is approved, you can also select View DCS to view the digital copy on the DCS site.

To view the citation in the DCS:

On the Edit Reading List page (Fulfillment > Course Reserves > Reading Lists; select the reading list) in the Citations tab, select the View DCS citation action. The DCS web site opens, displaying the attached item.

To remove the citation’s attachment to a DCS item or URL:

On the Edit Reading List page (Fulfillment > Course Reserves > Reading Lists; select the reading list) in the Citations tab, select the Remove DCS citation action. The citation is no longer attached to the DCS item.

Attaching Citation Attributes to Citations

To configure the available citation attributes, see Configuring Citation Attribute Types, Configuring Citation Attributes, and Mapping Citation Attributes to Citation Attributes Types.

To attach citation attributes to citations:

1. Edit the citation (see Editing a Citation). The Edit Reading List Citation page appears. Select the Citations Attributes tab.

2. In the Citation Attributes section, select Add, select a citation attribute type and the citation attribute you want to map, and select Add Citation Attribute. The selected values appear in a table.
3. Select Save. The added citation attribute appears in the reading list information on the Edit Reading List page.

---

### Printing Slips for Citations or Generating a Citation Print Slip Report

If inventory items are geographically nearby and/or you have access to them, you can fetch the items from the shelves by printing a slip for the citations. On the Edit Reading List page ([Fulfillment > Course Reserves > Reading Lists](#)); select the reading list) in the **Citations** tab:

- Select the **Print Slip** citation action.
- Select one or more citations and select the **Print Slip** top action. A print slip is generated for each citation.

For information about the print slip, see the [Ful Citation Slip Letter in Configuring Alma Letters](#).

You can also generate a print slip report that is sent to a printer or email address, or can be downloaded to a local machine. The report is an Excel file that contains the citations and their information, including Title, Author, Location, Call Number, ISBN/ISSN, Edition, Imprint, Availability, Electronic Availability, and Digital Availability.

**To generate an Excel print slip report for citations:**

1. On the Edit Reading List page ([Fulfillment > Course Reserves > Reading Lists](#); select the reading list) in the **Citations** tab, select the citations and select the **Print Slip Report** top action. The Print Slip Report dialog box appears.

2. Select whether to send the report by email ([Email](#)) or to a printer ([Printer](#)).
3. Select the destination:
   ◦ If sending by email, enter the email address in the Email field or the Alma user in the User field. The email letter used is the Ful Citations Slip Letter. For more information on the letter, see Configuring Alma Letters.
   ◦ If sending to the printer, select the printer in the Printer field.
4. Optionally download the report by selecting Download.
5. To send the report to the selected destination, select Send.

Managing a Citation's Copyright Status

You can manage a copyright's status manually or using Alma's copyright approval system.

- When you manage a citation's copyright status manually, the citation's copyright status is for informational (UI) and record-keeping purposes only; except as noted below, the citation's status has no workflow effect in Alma, and it's status does not change its visibility in Leganto or Primo. The status is managed manually if Copyright Auditing Required is not selected on the Edit Reading List Citation page, and no other copyright licensing is declared for the citation (self-declared, Creative Commons).
- When you manage a citation's copyright status using Alma's copyright approval system (select Copyright Auditing Required on the Edit Reading List Citation page), the ability to manage the copyright status manually is disabled. New citations, and citations whose copyright information is changed, are passed through an automatic copyright approval process (configured using copyright approval rules); when required, citations are sent to an operator for manual approval.

The available copyright statuses for a citation are:

- **Approved** - In you are implementing Leganto, you can have Alma automatically change the citation's status when a citation's copyright status is set to Approved. See Configuring Default Statuses for Citations/Reading Lists.
- Declined
- Not Determined
- Not Required
- Required
- Self Declared - The instructor indicates that no copyright clearance is required; for example, for material written and uploaded by the instructor.
- Waiting for Approval - An approval task is waiting for manual operator intervention. When the citation has this copyright status, you can resubmit the citation for automatic approval/rejection by selecting Recalculate Rules beneath the citation on the Edit Reading List page.
- Waiting for CC - Waiting for copyright clearance. When the citation has this copyright status, you can resubmit the citation for automatic approval/rejection by selecting Recalculate Rules beneath the citation on the Edit Reading List page.
- Fair Use

You can configure the copyright status that is selected by default for a new citation. See Configuring the Citation Default Copyright Status.

If you are using Leganto, an instructor can initiate an copyright or digitization request, self-declare a citation's copyright, or select a Creative Commons license in Leganto.

Manually Managing a Citation’s Copyright Status

To manage a copyright manually, you can set the copyright status for multiple citations on the Edit Reading List page or for one citation on the Edit Reading List Citation page while editing a citation.
If you are using Leganto, also see Clearing Copyrights Through the Copyright Clearance Center (CCC).

To change the copyright status of one or more citations:

On the Edit Reading List page (Fulfillment > Course Reserves > Reading Lists; select the reading list) in the Citations tab, select the citations, select the Change Copyright Status top action, select the status in the Change Copyright Status pop-up that appears, and select Change Copyright Status.

All selected citations that are not managed automatically by Alma are updated to the selected citation. All selected citations that are managed automatically by Alma are not affected.

Automatically Managing a Citation's Copyright Status

When a citation is marked for automatic management of its copyright status, users cannot set the copyright status of the citation manually.

To send the citation for automatic copyright clearance:

When editing a citation (see Editing a Citation), in the Copyright Attributes tab, select Copyright Auditing Required and enter information in the Copyright Attributes area. For information on most of these fields, see staff digitization request in Creating a Request. If you are implementing Leganto, an administrator can make the Source for Copyright field mandatory and select its default value, see copyright_source in Configuring Leganto Copyright-Related Procedures.

Note

Unlike when directly creating a request for a resource, when entering the copyright attributes for a citation, the field Resource Total Pages may be filled in automatically by the contents of the resource's bibliographic record 300 field. In this case, Alma tries to normalize the field's value (which may contain multiple ranges, including roman numerals) with a total page count, but, if unsuccessful, Alma copies the 300 field as-is to Resource Total Pages. Ensure that the value in Resource Total Page contains only regular digits before saving the citation.

Alma uses digitization and copyright rules to automatically set the copyright status of a new citation (or an existing citation whose copyright attributes are changed) to Approved or Declined, or to send an approval task to an operator. For more information, see Configuring Digitization and Copyright Rules. For information about approving or rejecting the requests as an operator, see Approving/Rejecting a Request for Digitization.

When a citation's copyright status is Waiting for Approval or Waiting for CC, you can resubmit the citation for automatic approval/rejection by selecting Recalculate Rules beneath the citation on the Edit Reading List page. This is useful, for example, when you change the digitization and copyright rules, or when a citation's copyright attributes changed but the citation was not automatically resubmitted for automatic approval/rejection.

Once a reading list is associated with a course, approved copyright records may be fully or partially locked for accounting purposes. In a reading list associated with a course, if you make any changes to the fields, then, depending on the timing and status of the existing copyright request, you may be offered to update the request or make a new request. If the new/updated request is not automatically approved, Alma creates an approval task for manual handing by a librarian. If you delete a citation with an approved copyright request (by a licensing agency; not self-declared or by Creative Commons), what happens to the record depends on the deletion date:
• Before the course starts - The copyright record is deleted.
• During the course - The copyright record's end date is changed to the date that the citation is deleted. The end date of an automatically approved copyright cannot be set to earlier than the current date.
• After the course - The copyright record is preserved. This is also the case if you change the copyright management from automatic to manual.
Configuring Leganto

For information on configuring Leganto, see the Leganto Administration Guide.
Configuring Fulfillment

This section includes:

- Configuring Fulfillment Activities – Overview
- Configuring Library Fulfillment Infrastructure
- Configuring Physical Locations
- Configuring Remote Storage Facilities
- Physical Fulfillment
- Patron Configurations
- Configuring Digital Fulfillment
- Courses
- Configuring Resource Sharing
- Discovery Interface Display Logic
- General
- Configuring Copyright Management
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
- Copyright features

This section describes how to configure the various fulfillment functions. See the Alma Glossary for definitions of these functions. Fulfillment activities are configured in Alma according to location. Note that some configuration changes in Fulfillment impact other functional areas. Consider the impact on other functional areas before making changes to existing configurations.

The following table lists the configuration options.

For a full reference of all the code tables provided with Alma, see Alma Code Table Reference.

<table>
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<tr>
<th>Configuration Options</th>
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<td>Digitization and Copyright Rules</td>
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<tr>
<td>Access Rights</td>
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<td>Copyright Declaration</td>
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Configuring Library Fulfillment Infrastructure

Configuring Fulfillment Services Between Libraries Within an Institution

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 or receive the service from all libraries in the institution. If All is selected for a service but an individual library has a different value, the library’s selection will take precedence.

You configure fulfillment relationships on the Organizational Units Relationships Setup page (Configuration Menu > General > Libraries > Relationships).

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 **Configuring** filter on the Fulfillment Configuration page.

The following actions can be performed on this page:

- Adding Organizational Unit Relationships (see Adding Organizational Unit Relationships)
Adding Library Relationships

You can add organizational unit relationships.

To add organizational unit relationships:


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. If this option is not chosen and a loan or return is attempted by a different library, a block on the action may be applied. For more information on block preferences, see Configuring Block Preferences.
   - 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), and on the Manage Resource Options page when managing fulfillment options for a request (see Managing Fulfillment Options).

For details on configuring a library to perform services for another library in an institution, see Configuring Fulfillment Relationships.

4. Select Add and Close to close the dialog box. The relationship you defined is listed under Library Relationships on the Organizational Units Relationships Setup page.

Configuring Transit Time Rules

To configure transit time rules, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Transit time rules enable Alma to calculate 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 below.

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 (Configuration Menu > Fulfillment > Library Management > Transit Time).

Transit Time Rules Page

Note

Transit time rules can be configured at the institution level only. Select the required institution from the Configuring filter on the Fulfillment Configuration page.

The following actions can be performed on this page:

- Adding a transit time rule (see Adding a Transit Time Rule)
• Editing a transit time rule (select **Edit** from the row actions list)
• Deleting a transit time rule (select **Delete** from the row actions list)
• Editing the default transit time rule (select **Edit** from the row actions list for the default rule)
• Enabling or disabling the transit time rule
• Moving transit time rules up or down in order of preference. The order of the rules within the list of rules is significant because Alma applies the first (enabled) rule whose input parameters are satisfied.
• Calculating the ETA for a Resource (see [Calculating the Estimated Time of Arrival For a Resource](#))

**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:**


**Note**

If you want to create a copy of an existing transit time rule, select **Duplicate** from the row actions menu. Once you have copied the rule, you can modify it as needed.

![Transit Time Rules Editor Page](image)

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.

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:

Delivery time (in hours) - time that it will take to deliver the item when the specified input parameters are fulfilled.

Use for Hold Request Pickup Calculation - select this check box for the item to be considered for a request on a different campus. The check box is displayed only when the From and To library fields are configured and the Material Type field is Any. By default, the check box is not selected.

When a hold request is created and the holdings to fulfill the request is not available in the selected pickup location, Alma matches the holdings to the request using additional parameters as follows:

- Alma attempts to locate a holdings belonging to another library on the same campus as the pickup location.
- If no holdings is found on the same campus, more than one holdings exists in different locations on the campus, or if no campuses have been defined, Alma checks the Transit Time Rules. If a rule exists for this holdings and the new check box, Use for Hold Request Pickup Calculation, is selected, Alma chooses this holdings. The check box is displayed only when the From and To library fields are configured and the Material Type field is Any. By default, the check box is not selected. See Adding a Transit Time Rule.
- If more than one holdings has a transit time rule, then the holding with the shortest transit time is selected.

Note

From and To libraries are the only input parameters on the transit time rule considered for the location calculation.

5. Select Save. The rule you defined is listed at the bottom of the list of rules on the Transit Times 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:

2. In the **Transit Time - Input** section, enter the input parameters for the calculation. See step 3 in *Adding a Transit Time Rule* for details on the input parameters.

3. Select **Calculate ETA**. The calculated ETA is displayed in the **Delivery time** field.

---

**Configuring Reshelve Without Transit Rules**

To configure reshelve without transit rules, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can set relation rules between libraries, departments and circulation desks so that transit for reshelving will not be required between certain libraries. This reduces redundant work effort by not automatically putting items in transit for reshelving when the libraries are close to each other. This does not affect other transit types, such as hold shelf, work order, and processing. For more detailed information and an example of this functionality, see *Transit for Reshelving Rules and "No Transit"*.  

The default rule has no input parameter and an output parameter set to false to put all items into transit when reshelving. Each rule can be either enabled or disabled. By default, each new rule is enabled.

Reshelve Without Transit Rules Page

Note
Reshelve without transit rules can be configured at the institution level only. Select the required institution from the Configuring filter on the Fulfillment Configuration page.

The following actions can be performed on this page:

- Adding a reshelve without transit rule (see Adding a Reshelve Without Transit Rule)
- Editing a reshelve without transit rule (select Edit from the row actions list)
- Deleting a reshelve without transit rule (select Delete from the row actions list)
- Editing the default reshelve without transit rule (select Edit from the row actions list for the default rule)
- Enabling or disabling the reshelve without transit rule
- Moving reshelve without transit rules up or down in order of preference. The order of the rules within the list of rules is significant because Alma applies the first (enabled) rule whose input parameters are satisfied.

Adding a Reshelve Without Transit Rule
You can add a new reshelve without transit rule, which can be either enabled or disabled. By default, each new rule is enabled.

To add a transit time rule:


Note
If you want to create a copy of an existing reshelve without transit rule, select Duplicate from the row actions menu. Once you have copied the rule, you can modify it as needed.

Reshelve Without Transit Rules Editor Page

2. In the Reshelve Without Transit 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. For all of the
input parameters, multiple selections may be chosen:

- **From Library** – The source—that is, the library from which the item is sent. Select the operator *(In List or Not In List)* and one or more libraries of this institution.

- **From Department** - Select the operator *(In List or Not In List)* and the department. If one library is selected in **From Library**, all departments within that library are displayed. If no libraries are selected in **From Library**, all departments in the institution are displayed. If two or more libraries are selected in **From Library**, the field is disabled and no departments can be chosen.

- **From Desk** - Select the operator *(In List or Not In List)* and the desk. If one library is selected in **From Library**, all circulation desks within that library are displayed. If two or more libraries are selected in **From Library**, the field is disabled and no desks can be chosen.

- **To Library** – The destination—that is, the library to which the item is delivered. Select the operator *(In List or Not In List)* and one or more libraries of this institution.

- **To Location** – This field is disabled by default. If a single library is selected in the **To Library** field, select the operator *(In List or Not In List)* and one or more locations of the selected library.

4. In the **Output Parameters** section, specify the following parameters:

- **Reshelve Without Transit** – Select True to set the rule to reshelve an item without transit when the specified input parameters are fulfilled. Select False for all items to reshelve with transit.

- **Time to reshelve (hours)** – Specify the period of time in hours (or portions of hours, such as 10.5) that is allotted to place an item back on the shelf after it has been returned. During this time, Alma and Primo will indicate to patrons and librarians that the status of the item is available and awaiting reshelving. When this period of time expires, the status will show that the item is in place on the shelf.

  Watch the Reshelving Items Time video (2:07 min).

5. Select **Save**. The rule you defined is listed at the bottom of the list of rules on the Reshelve Without Transit Rules page.

When an item is scanned in to a location other than its owning library, Alma checks these rules. If there is no transit relation between the current location of the item and its destination, the item is set to In Transit. Otherwise, it is set to Item In Place.

---

**Configuring Parameters of a Resource Sharing Library**

To configure parameters of a resource sharing library, you must have one of the following roles:

- General System Administrator

Libraries within an institution or campus may be configured to have relationships where they enable patrons to check in or check out resources at another location, send items back and forth, or acquire (purchase) items on behalf of each other. If a library is configured to do this for libraries at other institutions (and not only within the institution), it is known as a resource sharing library.

See [Adding a Library](#) for more information about configuring libraries.

**To configure resource sharing library information:**
1. On the Summary tab page (Configuration Menu > Fulfillment > Library Management > Library Details), modify the Organization Unit Name and Description fields, as necessary, and enter your ISIL code (see ISIL Code for more information).


3. Select Itemless to designate the library as an itemless resource sharing library (see Configuring an Itemless Resource Sharing Library).

4. Enter the ISO symbol of your resource sharing library in the ISO symbol field to indicate that the library works with ISO.

5. To set up borrowing requests:
   1. When Cancel request on locate failure is selected, Alma automatically cancels requests for which the borrowing locate process was not able to find a potential partner (see Borrowing Locate Process).
   2. 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.
When selecting this option, the borrowing locate process is automatically triggered when a borrowing request is created from any interface – Alma, Primo or API (see Borrowing Locate Process).

**Note**

The automatic locate may be activated only if the Automatic Rota Assignment Rules have also been activated to automatically attach a rota to the request. The locate process then runs on the automatically attached rota.

3. Select **Temporary inactive for borrowing** to indicate that this library is blocked for borrowing requests.
   1. When selected, the field, **Inactive dates range**, is displayed. Select a date range to specify that the block is only applicable during the specified time period. If the date range is left empty, the library remains inactive until the **Temporary inactive for borrowing** check box is deselected. This inactive status will block borrowing requests for this library whether they are created via the UI, an API, or in Primo. For Primo users, the resource sharing request link will be hidden. For Alma UI users and API processes, when requesting an item, a block message will display. The block message may be overridden in the Alma UI.

4. In the **Default location** field, select the default temporary location to which designated inventory will be moved for fulfillment of the borrowing request.

5. In the **Default pickup location** field, select the library that is to be the default pickup location for resource sharing requests. If the default pickup location is left blank, the resource sharing form will have a blank pickup location field.

6. To set up lending requests:

1. Select **Automatically locate resource** for Alma to attempt to locate the requested resource locally. (For more information on this process, see Lending Locate Process.)
   When selecting this check box, four additional check boxes will appear:
   1. Select the **Reject request when locate fails** check box to reject a lending request when the locate did not find any matching items.
   2. Select the **Reject request when no available items** check box to reject a lending request when there are no items that are available in place.
   3. Select the **Reject request when no requestable items** check box to reject a lending request when there are no items that are requestable for resource sharing, according to the applicable policy.
   4. Select the **Reject request when only electronic available** check box to reject requests when only an electronic item is available.

2. Select **Ignore electronic resources** for the locate process to only consider physical items.

3. Select **Automatic creation** for the partner field to be visible on the shipping items page. For details on automatic creation of lending requests from shipping items, see Shipping Items.

4. Select **Temporary inactive for lending** to indicate that this library is blocked for borrowing requests.
   1. When selected, the field, **Inactive dates range**, is displayed. Select a date range to specify that the block is only applicable during the specified time period. If the date range is left empty, the library remains inactive until the **Temporary inactive for lending** check box is deselected. This inactive status will block lending requests for this library.

5. In the **Default location** field, select the default temporary location to which designated inventory will be moved for fulfillment of the lending request.
7. Select the **Locate by Fields** check box to filter the search in the resource sharing library. This process narrows the results available for the locate process. The page refreshes and displays the new search fields.

The page displays the search fields, as follows:

Select the fields by which you want resources to be searched for in the resource sharing library.

- Title
- Author
- ISBN/ISSN
- OCLC Number
- Edition
- LCCN
- Other Standard ID
- Barcode
- DOI

8. Select the **Default printer** to define the printer that will be used for this resource sharing library when a user performs an action that can be done while not at a desk (such as shipping). When the user is at a desk, the default printer is based on the desk.

9. Select **Save**.

---

**Note**

For information on configuring a library for SLNP, please see the [Developer Network](#).

---

**Configuring an Itemless Resource Sharing Library**

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.
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.
2. Select Send. The Request Status = Request sent to partner.
3. To receive the requested resource, select Receive for the request. The Received Items page appears.
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).

For more information about itemless broker requests, see the More Information About Itemless Broker Workflow video (14:44 mins).

Configuring Circulation Desks

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 (Configuration Menu > Fulfillment > Library Management > Circulation Desks).

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 Configuring filter on the Fulfillment Configuration page.

Select 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)
• Editing a circulation desk (select Edit from the row actions list)
• Deleting a circulation desk (Delete from the row actions list)

Adding a Circulation Desk

You can add a circulation desk to a library.

To add a circulation desk:

1. On the Circulation Desk page (Configuration Menu > Fulfillment > Library Management > Circulation Desks), select Add Circulation Desk. The Circulation Desk – General Information page appears. This is the first page of a five-page wizard.
### Note

You can create a new circulation desk by creating a copy of an existing circulation desk. Select **Duplicate** from the row actions list and modify the new circulation desk as needed.

1. Enter the circulation desk code and name (both required) for the new circulation desk.
2. Enter information in the remaining optional fields, as described in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
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<tr>
<td><strong>General Details:</strong></td>
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</tr>
<tr>
<td>Primary</td>
<td>Select this check box if the circulation desk can perform check-out and check-in services for another library. For details, see <em>Configuring Fulfillment Relationships</em>.</td>
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<td><strong>Note</strong></td>
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<td>For the request option to display in Primo, a library must have at least one primary desk configured.</td>
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<tr>
<td>Reading room desk</td>
<td>Select this check box if the circulation desk serves a reading room.</td>
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<td></td>
<td>• When a patron checks out a resource from a reading room, the patron is not permitted to remove the resource from the reading room.</td>
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<td></td>
<td>• When a patron checks a resource in to a reading room, the patron must specify the check-in mode:</td>
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<tr>
<td></td>
<td>• <strong>Final</strong> — The patron no longer requires the resource, and the resource can therefore be returned to its permanent location.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Not final</strong> — The patron still requires the resource. The resource should therefore be stored on the reading room’s hold shelf.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong></td>
</tr>
<tr>
<td></td>
<td>If a circulation desk serves as a reading room, regular loans and returns (check-in/check-out) cannot be performed at this desk.</td>
</tr>
<tr>
<td></td>
<td>If a circulation desk serves as a reading room and has a self check profile attached, items that are checked out via self check at this desk will not get desensitized.</td>
</tr>
<tr>
<td>Location to move items to</td>
<td>When configuring a reading room desk, select a location that will temporarily store the loaned items. The locations drop down box is populated by the list of locations that have a reshelving relationship with this desk. Populating the Location to move items to box is optional and blank by default. Only one temporary location may be selected at a time.</td>
</tr>
<tr>
<td>Picks from shelf</td>
<td>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.</td>
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<td></td>
<td><strong>Note</strong></td>
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<td></td>
<td>In order to place a request, the item's location must be attached to a circulation desk that is configured with both Picks from shelf and reshelve capabilities.</td>
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<tr>
<td>Field</td>
<td>Description</td>
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</tbody>
</table>
| 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. |
| Time to reshelve (hours) | The period of time that the item is considered as available, but shows as being reshelved in Alma and Primo so patrons and librarians know not to search for it on the shelf. This value overrides a library level configuration and may include decimals. |
| Delay for hold notification (minutes) | Define how long Alma waits before sending a hold notification to a patron. When the delay is complete, Alma checks to see if the request is still active and if so, sends the hold notification to the patron. If the value is populated for both the circulation desk and the library, the value in the circulation desk is used. |
| Additional Information: | |
| Description | A textual description of the circulation desk. |
| Map | Not in use. |
| Printing Information: | |
| Default Printer | The default printer that is associated with the circulation desk can be selected from the Default Printer list. If only the default printer is selected, this is the printer used for all non-automated print jobs. If more printers are selected in the Additional Printers field, each user has the option of where to print.  
Select a printer from the drop-down list. |
| Additional Printers | After the Default Printer is selected, this field is made available to select one or more additional printers that users may set for their printing. Selecting one or more printers here will display an additional drop-down list on the Currently At drop-down window. |
| Creates return receipts | Select for return receipts to automatically be printed at the circulation desk. The Return Receipt Letter is generated. For details on customizing the letter, see Configuring Alma Letters. |
| 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  

**Note**  
If User preferred email is selected but no email exists for the user, the receipt will be printed to the printer instead. |
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creates loan receipts</td>
<td>Select for loan receipts to automatically be printed at the circulation desk. The Loan Receipt Letter is generated. For details on customizing the letter, see <a href="#">Configuring Alma Letters</a>. Note that the receipt is triggered at the circulation desk when selecting Done to terminate a session with a patron. The Creates loan receipts also affects loans from self-check machines. Because there are no sessions at self-check machines, every loan action triggers the sending of receipt.</td>
</tr>
<tr>
<td>Loan receipt destination</td>
<td>Displayed only when Creates loan receipts is selected. From the drop-down list, choose the destination for the loan receipt:</td>
</tr>
<tr>
<td></td>
<td>- User preferred email</td>
</tr>
<tr>
<td></td>
<td>- Circulation desk printer</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong></td>
</tr>
<tr>
<td></td>
<td>If User preferred email is selected but no email exists for the user, the receipt will be printed to the printer instead.</td>
</tr>
<tr>
<td>Hold Shelf Information:</td>
<td>Select this check box if the circulation desk has a hold shelf. The following fields are then displayed:</td>
</tr>
<tr>
<td></td>
<td>- <strong>Hold shelf sorting</strong> – The criteria by which hold shelf items are sorted. Choose from the following options:</td>
</tr>
<tr>
<td></td>
<td>- Call Number</td>
</tr>
<tr>
<td></td>
<td>- Hold Shelf Expiry Time</td>
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<tr>
<td></td>
<td>- Hold Shelf Placement Time</td>
</tr>
<tr>
<td></td>
<td>- Requester ID</td>
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<tr>
<td></td>
<td>- Requester Name</td>
</tr>
<tr>
<td></td>
<td>- Title</td>
</tr>
<tr>
<td></td>
<td>The value you select displays as the default option in the Sort by field on the Active Hold Shelf Items page (see <a href="#">Managing Active Hold Shelf Items</a>).</td>
</tr>
<tr>
<td></td>
<td>- <strong>Maximum time on hold shelf (Days)</strong> – The maximum number of days that an item can stay on the hold shelf.</td>
</tr>
<tr>
<td></td>
<td>When earlier than the Policy Type = Hold Shelf Period setting, this setting takes precedence. For example: Maximum time on hold shelf (Days) = 3 Policy Type = Hold Shelf Period &gt;= 5 The item can stay on the hold shelf for 3 days.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Has hold shelf processing</strong> – 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:</td>
</tr>
<tr>
<td></td>
<td>- Scan In Items page – Scan In Items tab (see <a href="#">Scanning Items</a>)</td>
</tr>
<tr>
<td></td>
<td>- Scan In Items page – Change Item Information tab (see <a href="#">Scanning Items</a>)</td>
</tr>
<tr>
<td></td>
<td>- Manage Item Returns page (see <a href="#">Returning Items</a>)</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong></td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
</tbody>
</table>

Ex Libris, a ProQuest Company
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<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>
</tbody>
</table>

**Digitization Department:**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supports digitization</td>
<td>Select this check box if the circulation desk supports digitization. The <strong>Work time (days)</strong> 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).</td>
</tr>
</tbody>
</table>

**Payment Information:**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit card</td>
<td>Select to indicate that the circulation desk can accept payment by credit card.</td>
</tr>
<tr>
<td>Cash</td>
<td>Select to indicate that the circulation desk can accept payment by cash.</td>
</tr>
<tr>
<td>Online</td>
<td>Select to indicate that the circulation desk can accept payment performed online.</td>
</tr>
<tr>
<td>Check</td>
<td>Select to indicate that the circulation desk can accept payment by check.</td>
</tr>
<tr>
<td>Print receipt?</td>
<td>Select whether the circulation desk can print a receipt.</td>
</tr>
<tr>
<td>Receipt copy email</td>
<td>Enter the e-mail address to which you want receipts for payment to be sent.</td>
</tr>
</tbody>
</table>

**Self-Check Information:**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| 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](#). |

**RFID Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>IP Address</td>
<td>The RFID IP address of the relevant RFID reader. This is relevant if using Nedap RFID, or using the Other RFID type with a central RFID server that communicates with the RFID reader. If the department is managed by a circulation desk, enter the IP address here. If the department is not managed by a circulation desk, enter the IP address in Work Order Departments (See <a href="#">Adding a Department</a>).</td>
</tr>
</tbody>
</table>

2. Select **Next**. The Circulation Desk – Physical Locations page appears. This is the second page of the wizard. Use this page to specify which locations are served by the circulation desk.
1. From the Physical location type filter, select to display all locations, or only closed, open, unavailable, or remote storage locations.

2. Select Attach Location. 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.

3. Specify the services — Check in, Check out, and/or Reshelve — that are performed by the circulation desk for the selected location.

4. Select Attach Location to add the selected location to the list of locations that are served by the circulation desk.

3. Select Next. The Circulation Desk – Work Order Types page appears. This is the third page of the wizard. Use this page to define work orders types to be associated with the specified circulation desk.

1. Select Add Work Order. The Add work order dialog box appears.

2. In the Work order type field, specify a work order type to be handled by the circulation desk.

3. 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.

4. Select Add to add the work order and enable adding another work order, or select Add and Close to add the work order and return to the Circulation Desk — Work Order Types page.

Add Work Order Dialog Box
5. Select **Save**. The circulation desk serves as a work order department for the indicated work order types.

4. Select **Next**. The Circulation Desk - Operators page appears. 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.

1. Select **Add Operator**. The Add Operator dialog box appears.

2. Select an operator (required) who performs functions at the circulation desk.

3. Specify the roles — **Circulation Desk Operator**, **Circulation Desk Manager**, and/or **Requests Operator** — of the operator (see Adding Roles to Users for details on operator roles).

4. Select **Add and Close** to close the dialog box. The selected operator is added to the list of operators of the circulation desk.

5. Select **Next**. The Circulation Desk – Automatic Printing page appears. This is the fifth and last page of the wizard. Use this page to specify the rules for automated printing of request slips from the circulation desk for items that need to be fetched from the shelf. (Note that when an item is not on the shelf and its request processing starts when it is scanned in, the printing occurs at the desk at which it is scanned in.)

![Circulation Desk – Automatic Printing Page](image)

Circulation Desk – Automatic Printing Page

1. Select **Add Rule**. The Automatic Printing Rules Editor page appears.

![Automatic Printing Rules Editor Page](image)

Automatic Printing Rules Editor Page

2. Enter the **Name** (required) and **Description** (optional) of the rule you are defining.

3. 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 item’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.

4. Select Add Parameter. 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.

5. 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.

6. Select Save on the Automatic Printing Rules Editor page to save the rule.


1. In the Automatic Printing Rules Editor section, modify the default rule name and description if required.

2. 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.

3. Select Save to save your changes to the default rule.

4. Select 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.

Configuring SIP2 Bin Configuration

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 that determine the sort bin field for SIP2 machines (self-check). SIP2 is the Standard Interchange Protocol v2, which provides a standard interface between a library’s automated circulation system and a self-check machine. The sort bin is field in the protocol that determines into which bin (a physical bucket inside the SIP2 machine) that a returned item is placed. You can set the field according to rules based on various values, such as the destination library and the call numbers.

For more information on self-check machines, see [https://developers.exlibrisgroup.com/alma/integrations/selfcheck](https://developers.exlibrisgroup.com/alma/integrations/selfcheck).

The following actions can be performed on this page:

- Adding a SIP2 bin configuration rule (see Adding a SIP2 Bin Configuration Rule)
- Editing a SIP2 bin configuration rule (select Edit from the row actions list)
- Deleting a SIP2 bin configuration rule (select Delete from the row actions list)
- Enabling or disabling the SIP2 bin configuration rule

Adding a SIP2 Bin Configuration Rule

You can add a SIP2 Bin Configuration Rule.

To add a 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: Destination 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>
<thead>
<tr>
<th>Name</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Destination library</td>
<td>The libraries in the institution. For details on adding a library, see Configuring Libraries.</td>
</tr>
<tr>
<td>Destination circulation desk</td>
<td>The circulation desk. For details on configuring circulation desks, see Configuring Circulation Desks.</td>
</tr>
<tr>
<td>Destination service units</td>
<td>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.</td>
</tr>
<tr>
<td>From call number</td>
<td>The call number from which you specify the rule to take effect when the item’s call number is numerically greater than the indicated value.</td>
</tr>
<tr>
<td>Is requested</td>
<td>Indicates if the resource has been requested (Yes or No).</td>
</tr>
<tr>
<td>Lexicographical From</td>
<td>The call number from which you specify the rule to take effect when the item’s call number is</td>
</tr>
</tbody>
</table>

Note

Self-check machine bin usage rules can be configured at the institution level only. Select the required institution from the Configuring filter on the Fulfillment Configuration page.

If you want to create a copy of a SIP2 bin configuration rule, select Duplicate from the row actions list. Once you have copied the rule, you can modify it as needed.
<table>
<thead>
<tr>
<th>Name</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>call number</td>
<td>lexicographically (in other words, alphabetically) greater than the indicated value. For example, 2 &gt; 10 &gt; 1 in lexicographic order.</td>
</tr>
<tr>
<td>Lexicographical To call number</td>
<td>The call number from which you specify the rule to take effect when the item’s call number is lexicographically (in other words, alphabetically) less than the indicated value. For example, 1 &lt; 10 &lt; 2 in lexicographic order.</td>
</tr>
<tr>
<td>Reshelf item location</td>
<td>The library within the institution where you want to reshelve the item. For details on adding a library, see Configuring Libraries.</td>
</tr>
<tr>
<td>Self check circulation desk</td>
<td>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.</td>
</tr>
<tr>
<td>To call number</td>
<td>The call number from which you specify the rule to take effect when the item’s call number is numerically less than the indicated value.</td>
</tr>
</tbody>
</table>

4. Select 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. Ensure that the number here matches the number of a bin configured on the SIP2 machine.

7. Select Save to store the new rule. The rule displays on the SIP2 Bin Configuration Rules page.

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.
Configuring Physical Locations

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. A physical location is associated with a library, not the institution. For more information on the relationship between institutions, libraries (organization units), and physical locations, see Configuring the Institution and Its Libraries. Note that physical locations may be located off-site in a remote location. For details, see Configuring Remote Storage Facilities.

You configure physical locations from the Physical Location List page (Configuration Menu > Fulfillment > Locations > Physical Locations) or (General System Administrator only) Configuration Menu > General > Locations > Physical Locations).

**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 Configuring filter on the Fulfillment Configuration page.

**Physical Locations List Page**

The following actions can be performed on this page:

- Add a physical location (see Adding a Physical Location)
- Edit a physical location (see Editing a Physical Location)
- Duplicate a physical location (Duplicate in the row actions list and edit the relevant fields)
- Delete a physical location (Delete in the row actions list)

**Note**

- A location cannot be deleted if there is inventory associated with it (there are items with that location code). You must move the items to another location before you delete the location.
• Modifying a physical location may have implications for several functional areas in Alma. Ensure that you properly coordinate any changes that you make.

Adding a Physical Location

You can add a physical location.

To add a physical location:

1. On the Physical Locations List page (Configuration Menu > Fulfillment > Locations > Physical Locations), select Add Location. A dialog box appears.
2. Enter the location code (up to 10 characters, no commas allowed) and name, which are both required fields, as well as the external location name, if applicable.
3. From the **Type** list, select the type of the location. Distinguishing between different types of locations enables you to filter by location type on the Physical Locations List page.
   - **Open** – A location that can be accessed by patrons, who can remove an item from the location and then check out the item.
   - **Closed** – A location that is accessible by library personnel only and is not accessible to patrons.
   - **Remote Storage** – A remote storage location, which is similar to a closed location, except that it is located off-site. Retrieving of an item from a remote storage location may take longer than retrieving an item from a regular closed location.
   - **Unavailable** – A location from which items are considered unavailable for calculating the general electronic services in Primo. Note that this field has no other functional significance. For an understanding of how this selection works in conjunction with general electronic services and an example, see the options described for the **Disable service** field in the Service Details dialog box (under Configuring General Electronic Services).

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 Physical Fulfillment.

6. From the **Call number type** list, select a call number type for the location. This identifies the type of call number in the holdings record such as Library of Congress classification, Dewey Decimal classification, or National Library of Medicine classification.

7. Specify the URL of a map that can assist patrons in finding the location.

8. Select **Add Location** to add the location.

---

### Note

A location cannot have special characters, such as quotes ("), in the name. Use alphanumeric characters, hyphens, and underscores.

---

**Editing a Physical Location**

You can edit a physical location.

**To edit physical location information:**

1. On the Physical Locations List page (**Configuration Menu > Fulfillment > Locations > Physical Locations**), select **Edit** in the row actions list for a location.

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 Adding a Physical Location.

3. In the **Physical Location Circulation Desks List** section:
   - To create a new circulation desk and associate it with the physical location, select **Attach New Circulation Desk**. For additional information, see Adding a Circulation Desk.
   - 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 select **Attach Existing Circulation Desk**. For additional information, see Adding a Circulation Desk.

4. In the **Holdings Configurations** section:
In **Accession placement**, select the MARC subfield that you want to use for the accession number. Your options are:

- Piece designation (852 $$p)
- Call number (852 $$h)
- Shelving location (852 $$j)
- None (the default option)

By selecting a value from the drop-down list, you make the accession number field mandatory when creating a holdings record and cause this subfield to be indexed and thereby searchable in the repository.

In the **Call number type**, select the method in which the call number is generated.

- Select **Suppress from discovery** to suppress the publishing of items in this location to the discovery interface (Primo or Libraries Australia). Note that if the suppressed item is the only item linked to the title, the title will be suppressed provided the `suppressBibWithSuppressedHol` parameter (see [Configuring Other Settings](Resource Management)) is set to `true`.

- If a record has only one item that is suppressed on the location level, it is still published from the Network institution as New/Updated, but without the AVA field. To make the records not retrievable in Primo, suppress the records manually.

5. Select **Save** to store the changes you made to the physical location.

---

**Note**

If the external location name or **Suppress from discovery** status has been changed, a set of physical titles related to this location must be republished.
Configuring Remote Storage Facilities

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. For more information, see Requests to Remote Storage Facilities.

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 has a remote storage facility. For details, see Configuring Physical Locations.

You configure the remote storage facilities from the Remote Storage List page (Configuration Menu > Fulfillment > Locations > Remote Storage) or (General System Administrator only) Configuration Menu > General > Locations > Remote Storage)

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 Configuring Physical Locations.

To add a new remote storage facility:

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 Managing Requests and Work Orders.

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 Facilities.

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 scanned item is sent directly to the remote storage desk (i.e. the desk that has a reshelving relation with the item's location) for re-shelving, even if the scan-in desk is not the owning library.

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.

**Note**

This option is available only for an ASRS that supports the IR message.

9. **Allow Manual Description Requests** is selected by default. If the check box is deselected, requests with manual descriptions may not be entered for remote storage.

10. Select **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:**


   ![Edit Remote Storage Facility Page](image)

   **Edit Remote Storage Facility Page**

2. In the **Edit Remote Storage** section, edit the details as required. See [Adding a Remote Storage Facility](#) for details.

3. In the **Calendar Management** section, select **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](#).

   **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. Select **Save** to store your changes to the remote storage facility details.
Physical Fulfillment

Configuring physical fulfillment consists of configuring physical locations, request policies, terms of use, and fulfillment units.

A fulfillment unit is one or more physical locations within an institution that follow the same policies. Fulfillment units have Terms of Use (TOU) which define policies for patrons.

A sample workflow for configuring fulfillment units, policies, and Terms of Use is as follows:

1. **Create fulfillment and item policies** – See Adding Fulfillment Policies. These policies are applied to an item: whether it is renewable, where it can be picked up, how long it can be checked out, the fine assessed if the item is lost, and so forth.

   Fulfillment policies are bundled into a Terms of Use, which are attached to one or more fulfillment units; the policies then apply to all items that match the fulfillment unit criteria.

   Item policies are attached to a particular item and override any conflicting fulfillment policies in that location.

2. **Create Terms of Use** – This is a group of fulfillment policies for the items in a group of locations or for all items requested by the users in a group. See Adding a Set of Terms of Use.

3. **Create physical locations** – A physical location is an area within a library. See Adding a Physical Location. You associate a physical location with a fulfillment unit and then the physical location inherits the fulfillment unit’s policies. Each location can be assigned to only one fulfillment unit.

4. **Create fulfillment units** – Fulfillment units include one or more physical locations that follow the same policies. See Adding a Fulfillment Unit and Editing a Fulfillment Unit. When creating or editing a fulfillment unit, you configure:

   - From which physical locations items in these locations can be requested (anywhere, another library only, nowhere, and so forth)
   - The Terms of Use that apply to:
     - Specific locations (desks) within the physical location
     - Items of specific material types
     - Items with specific item policies
     - Items undergoing specific process types
     - Users with specific roles
     - Users in specific user groups

See the following training videos on fulfillment units: Fulfillment Units (Alma Administration Certification session) and Fulfillment Units in the Essentials Training Kit.

Configuring Fulfillment Units

To configure fulfillment units, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator
You configure fulfillment units on the Fulfillment Units List page (Configuration Menu > Fulfillment > Physical Fulfillment > Fulfillment Units).

![Fulfillment Units List Page](image.png)

**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 Configuring filter on the Fulfillment Configuration page.

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. Note that up to 1000 locations can be included in a fulfillment unit.

The following actions can be performed on this page:

- Adding a fulfillment unit (see Adding a Fulfillment Unit)
- Editing a fulfillment unit (see Editing a Fulfillment Unit)
- Duplicating a fulfillment unit (select Duplicate from the row actions list and edit the relevant fields)
- Deleting a fulfillment unit (select Delete from the row actions list)

---

**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 (Configuration Menu > Fulfillment > Physical Fulfillment > Fulfillment Units), select Add Fulfillment Unit.

   **Note**

   To create a copy of an existing fulfillment unit, select Duplicate from the row actions list. 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. Note that the code is limited to 10 characters.
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.

**Note**

The value selected in this field is limited by the **Pickup Locations** policy in the Request Terms of Use. For example, when **Pickup Locations = In Library**, if you select **Request for pickup anywhere regardless of availability**, items can be picked up only in the owning library; if you select **Request for pickup in different library only**, you have set an invalid configuration, since no pickup locations are available. In such a case,
5. Select Add Fulfillment Unit to close the dialog box. The new fulfillment unit appears on the Fulfillment Units List page.

6. After defining a new fulfillment unit, edit the fulfillment unit to 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.

---

**Editing a Fulfillment Unit**

You can edit the following information about a fulfillment unit:

- **Fulfillment Unit Details** – The parameters configured when adding a fulfillment unit (see To edit fulfillment unit details in Editing a Fulfillment Unit).

- **Fulfillment Unit Locations** – The physical locations that are associated with the fulfillment unit. These are the locations to which the Terms of Use/policies referenced by the fulfillment unit rules are applied.

- **Fulfillment Unit Rules** – The Terms of Use to apply to the fulfillment unit.

For details on configuring rules for a Resource Sharing Library, see Configuring Temporary Item Creation Rules.

**To edit fulfillment unit details:**

1. On the Fulfillment Units List page (Configuration Menu > Fulfillment > Physical Fulfillment > Fulfillment Units), ensure that you are at the relevant library or institution (in the Configuring link) and select a code or select Edit from the row actions list of a fulfillment unit. The Edit Fulfillment Unit page appears.

![Edit Fulfillment Unit Page – Fulfillment Unit Details Tab](image)

2. In the Fulfillment Unit Details tab, edit the general fulfillment unit details as required. For information on the fields requests cannot be submitted.
displayed on this page, see To add a fulfillment unit in Editing a Fulfillment Unit.

3. Select the **Fulfillment Unit Locations** tab. For details on configuring fulfillment unit locations, see Configuring Physical Locations.

4. To attach an existing location to the fulfillment unit, select **Attach Existing Location**. The Physical Locations List page appears.

5. Select the existing locations that you want to attach to the fulfillment unit and select **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.
- It is possible to move a location from one fulfillment unit to another even if items from the location are currently on loan. Note that if associating the location with a different fulfillment unit results in a change of the applicable Terms of Use, the new Terms of Use is applied with the subsequent action relating to the loan (for example, renewal).
- Note that up to 1000 locations can be included in a fulfillment unit.

---

6. To attach and add a new location, select **Attach New Location**. The Attach New Location dialog box appears.

![Attach New Location Dialog Box](image)

7. 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.

8. Enter a new code and new name for the new location (both fields are required), as well as a new external name, if applicable.

9. 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. Retrieving an item from a remote storage location may take longer than from a regular closed location.

10. Select **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, select **Remove** for a location.

11. Select the **Fulfillment Unit Rules** tab. The **Fulfillment Unit Rules** tab page appears.

![](image)

**Edit Fulfillment Unit Page – Fulfillment Unit Rules Tab**

12. In the **Rule Type** drop-down list, select one of the available rule types — **Booking, Loan, or Request**.

13. To add a new rule, select **Add Rule**. The Fulfillment Unit Rules Editor page appears.
14. In the **Fulfillment Unit Rules Editor** section, specify a name (required) and description (optional) for the rule.

15. 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 - Create a rule for items with specific item policies.
- Job category - Create a rule for users with specific roles.
- Location - Create a rule for locations (desks) within the named locations.
- Material type - Create a rule for items of specific material types.
- Patron Affiliated Campus - Create a rule to allow requests only from users affiliated with specific campuses.
- Process type - Create a rule for items undergoing specific process types.
- User group - Create a rule for users in specific user groups.
- Resource Sharing Partner - in Resource Sharing rules only - Create a rule for requests with specific partners.
- Request Format - in Borrowing Resource Sharing rules only - Create a rule for requests that have a specified format.

16. Select **Add Parameter**. 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). You can edit or delete rules.

17. In the **Output Parameters** section, specify the terms of use to be applied when the input parameters are met. Note that the list of available terms of use is determined dynamically, according to your previous selection of rule type. Select **TOU Details** to view the details of the Terms of Use that you select. For details on configuring terms of use, see [Configuring Terms of Use](#).  

18. Select **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.

19. If you have defined more than one rule for the fulfillment unit, in the **Fulfillment Unit Rules** tab, you can use the **Move Up** and **Move Down** arrows to set the order of the rules. Alma applies the first (and only the first) appropriate, enabled rule. If no appropriate rule is found, the system uses the default rule.
20. Select **Save** to store the fulfillment unit details. The new fulfillment unit appears in the list of fulfillment units on the Fulfillment Units List page.

In a collaborative network, you can create fulfillment units in the Network Zone and then distribute them to member institutions. The member institutions have view permission to the distributed records but are not able to edit or delete them. If an input parameter is selected in the Network Zone institution that does not exist in the member institution, the rule is not applied. When the Network Zone fulfillment unit has been distributed, the local rules contain two additional fields, **Use Rules from Network Fulfillment Unit** and **Use Network Rules First**.

Use Rules from Network Fulfillment Unit displays a drop down containing all of the fulfillment units that have been distributed from the Network Zone. Checking **Use Network Rules First** specifies that Alma will check the rules from the selected network fulfillment unit before processing the rules from the local fulfillment unit. When this checkbox is selected, Alma also considers the **On Shelf Request Policy** from the selected network fulfillment unit instead of the local **On Shelf Request Policy**. Additionally, the local fulfillment rule uses the network rule as the local default.

For more information, see Configuring Fulfillment Information in the Network Zone.

---

**Configuring Fulfillment Policies**

To configure fulfillment policies, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Fulfillment policies define the library service attributes and parameters that are imposed when a patron receives service from the library. For example, a fulfillment 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. Fulfillment policies are divided into policy types, such as **Due Date**, **Grace Period**, and **Lost Item Fine**. You can create a number of fulfillment policies for each type. When multiple fulfillment policies exist for a given type, you can specify the default.
Fulfillment 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**. When the institution or a library wants to update a given policy, that policy applies to the organization level for which it was configured, and is inherited downward. For example, updating a policy at the institution level changes the policy owner to **Institution**. This policy may then be used by all libraries of the institution. Alternatively, a specific library may further configure the policy.

You configure fulfillment policies on the Policy Management page (**Configuration Menu > Fulfillment > Physical Fulfillment > Advanced Policy Configuration**).

You configure fulfillment policies on the Policy Management page (**Configuration Menu > Fulfillment > Physical Fulfillment > Advanced Policy Configuration**).

![Policy Management Page](image)

### 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 **Configuring** filter on the Fulfillment Configuration page.

The following actions can be performed on this page:

- Add a new fulfillment policy (see **Adding Fulfillment Policies**)
- Edit a fulfillment policy. Select **Edit** from the row actions list.
- View Terms of Use that use this policy. Select **Show related terms of use** from the row actions list.
- Duplicate a policy. Select **Duplicate** from the row actions list and edit the relevant fields.
- Delete a policy. Select **Delete** from the row actions list.

### Adding Fulfillment Policies

You can add a new fulfillment policy to a Terms of Use.

**To add new policies:**

1. On the Policy Management page (**Configuration Menu > Fulfillment > Physical Fulfillment > Advanced Policy Configuration**), select **Add Fulfillment Policy**. The Select Fulfillment Policy Type page appears, displaying a list of policies. This is the first page of a two-page wizard.
2. On the Select Fulfillment Policy Type page, select the policy type. In the following table, the indicated values appear on the second page of the wizard after you select the policy type on this page.

<table>
<thead>
<tr>
<th>Fulfillment Policy Type</th>
<th>Description</th>
</tr>
</thead>
</table>
| Booking                 | The minimum amount of time required between consecutive booking requests for the same resource & requester. If Value type = None for this policy type, there is no minimum: a requester can book immediately after another booking. 
Values: None/Other. If you select Other, select a value and a unit of time measurement. |
| Back to Back Booking    | The amount of time after a 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. 
Values: None/Other. If you select Other, select a value and a unit of time measurement. |
<p>| Booking Release Time    | How far in advance an item can be reserved through a booking request. |</p>
<table>
<thead>
<tr>
<th>Fulfillment Policy Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Values:</strong> None/Other. If you select Other, select a value and a unit of time measurement.</td>
<td></td>
</tr>
<tr>
<td><strong>Is Item Bookable</strong></td>
<td>Whether booking is allowed. &lt;br&gt;<strong>Values:</strong> True/False</td>
</tr>
<tr>
<td><strong>Maximum Allowed Booking Length</strong></td>
<td>The maximum permitted duration of the booking request. &lt;br&gt;<strong>Values:</strong> None/Other. If you select Other, enter a value and a unit of time measurement.</td>
</tr>
<tr>
<td><strong>Pickup Location</strong></td>
<td>The locations where a patron can request to pick up a requested item. &lt;br&gt;The available values are: &lt;br&gt;◦ At Any Institution &lt;br&gt;◦ At Any Reading Room &lt;br&gt;◦ At Library Reading Room &lt;br&gt;◦ In Campus - The campus to which the item's library belongs &lt;br&gt;◦ In Institution - Includes all of an institution's libraries, not only those whose circulation desk has a Hold Shelf &lt;br&gt;◦ In Library In Patron Affiliated Campus - The campus to which the patron belongs</td>
</tr>
<tr>
<td><strong>Preview Period</strong></td>
<td>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. &lt;br&gt;<strong>Values:</strong> None/Other. If you select Other, enter a value and a unit of time measurement.</td>
</tr>
<tr>
<td><strong>Purged Request Fee</strong></td>
<td>A fee applied to an unfulfilled, expired booking request. By default, no fee is applied. If a request qualifies for the fee and is on the title level with multiple items having more than one terms of use that can be used, the lowest fee will be applied. &lt;br&gt;<strong>Values:</strong> None/Other. If you select Other, enter a fee amount.</td>
</tr>
<tr>
<td><strong>Booking Resolution</strong></td>
<td>Allows you to define the allowed resolution of your booking request. The policy has four values: &lt;br&gt;◦ <strong>Minutes</strong> - The booking will be defined by date, hour, and minutes. This is the default. &lt;br&gt;◦ <strong>Hours</strong> - The booking will be defined by date and hour. &lt;br&gt;◦ <strong>Days</strong> - The booking will be defined by date only. &lt;br&gt;◦ <strong>Days plus overnight</strong> - The end time of the booking will be defined to the next opening time of the library.  &lt;br&gt;When a booking request is created in Alma or Primo, the start and end time fields are now dependent on the value in this policy. If the value is <strong>Minutes</strong>, time fields are displayed with hours and minutes. If the value is <strong>Days</strong> or <strong>Days plus overnight</strong>, the time fields are hidden. If the value is <strong>Hours</strong>, time fields are displayed with hours and minutes but a warning message indicates that only hours should be selected.  &lt;br&gt;If multiple items exist for the same title with different booking resolutions (due to different terms of use), the least specific resolution is used. &lt;br&gt;See <a href="#">Creating Booking Requests</a>.</td>
</tr>
<tr>
<td>Fulfillment Policy Type</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Closed Library Booking Management</td>
<td>Allows you to define how to handle a booking request that includes closed hours for the library. The policy has three values:</td>
</tr>
<tr>
<td></td>
<td>◦ <strong>Expand to previous and next open times</strong> - Adjusts the start/end time according to the library's opening hours and allows booking over closed library periods. If the start/end date/time needs to be automatically adjusted, Alma ignores the item's maximum booking policy. This is suitable for items that you allow patrons to keep over the closed periods.</td>
</tr>
<tr>
<td></td>
<td>◦ <strong>New for November! Attempt expanding if within maximum allowed booking length</strong> - Adjusts the start/end time according to the library's opening hours and allows booking over closed library periods. If the start/end date/time needs to be automatically adjusted, Alma takes the item's maximum booking policy into account and may shorten the booking window. This is suitable for items that you allow patrons to keep overnight but not for longer periods.</td>
</tr>
<tr>
<td></td>
<td>◦ <strong>New for November! Only allow booking during open times</strong> - Adjusts the start/end time according to the library's opening hours and does not allow booking over closed library periods. If the booking window includes any closed times, the start or end dates/times will be automatically adjusted to be the first open period within the requested booking window, also taking into account the item's maximum booking policy. This is suitable for booking items such as library rooms or desks.</td>
</tr>
<tr>
<td>Loan:</td>
<td>Whether to trigger a block on the user record when an overdue loan is returned. The block may be selected for a period of time depending on the time the loan is overdue (based on only open days or all days), or may be for a fixed time. By default, all activities are blocked, however blocks may also be applied specifically for loan, renew, and/or request. The block is automatically lifted once the configured expiry date passes, as part of the Users - Remove Blocks job.</td>
</tr>
<tr>
<td></td>
<td>Values: None/Other. If you select Other, enter a value and a unit of time measurement.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong></td>
</tr>
<tr>
<td></td>
<td>For this policy to function correctly, the overdue block type must be defined in the User Block Description code table. While it is defined by default, if it has been removed, this policy will not be applied. See Configuring User Blocks Due to Overdue Loans.</td>
</tr>
<tr>
<td>Canceled Recall Due Date</td>
<td>What happens to a loan's due date when a recall placed on the loan is canceled. The values are:</td>
</tr>
<tr>
<td></td>
<td>◦ Restore the original due date</td>
</tr>
<tr>
<td></td>
<td>◦ Keep the same recalled due date unchanged</td>
</tr>
<tr>
<td></td>
<td>◦ Attempt to renew the recalled loan using standard renew procedures</td>
</tr>
<tr>
<td></td>
<td>For more information on recall requests, see Recall Requests.</td>
</tr>
<tr>
<td>Closed Library Due Date Management</td>
<td>How to manage fulfillment activities when the library is closed. The available values are:</td>
</tr>
<tr>
<td></td>
<td>◦ <strong>Keep</strong> – Keep the current due date and time</td>
</tr>
<tr>
<td></td>
<td>◦ <strong>Move backward</strong> – Move to the library closing time on the previous open day</td>
</tr>
<tr>
<td></td>
<td>◦ <strong>Move forward</strong> – Move to the library opening time on the next open day</td>
</tr>
<tr>
<td></td>
<td>◦ <strong>Move to the end of the next open day</strong> – Move to the library's closing time on the next open day (affects due dates that would otherwise fall on a day that the library is closed).</td>
</tr>
<tr>
<td></td>
<td>◦ <strong>Move to next open day (same hour)</strong> - The due date is set to the next open date with the original due date time.</td>
</tr>
<tr>
<td>Fulfillment Policy Type</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td><strong>Move to previous open day (same hour)</strong> - The due date is set to the previous open date with the original due date time.</td>
<td></td>
</tr>
</tbody>
</table>

**Note**
- When a due time is specified as part of the Due Date policy, if the due date is an open day, the Closed Library Due Date Management policy is ignored. If the due date is not an open day, the Closed Library Due Date Management policy is applied.

<table>
<thead>
<tr>
<th>Direct Delivery Fee</th>
<th>Currently under construction</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Due Date</strong></td>
<td>The length of time the item may be borrowed. The values are:</td>
</tr>
<tr>
<td></td>
<td>◦ <em>Fixed</em> – Based on your institution’s calendar, the end of a term. Select a semester.</td>
</tr>
<tr>
<td></td>
<td>◦ <em>Non Fixed</em> – Based on the date the item was borrowed. Select a value and a unit of time measurement.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>The due date on a borrowing request is the due date assigned by the lender. If the lender did not assign a due date, the operator may enter the date when the item is received.</td>
</tr>
<tr>
<td></td>
<td>The loan due date on a resource sharing item is the due date of the borrowing request, if present, less the delivery delay. If the due date is not populated on the borrowing request, the due date is set based on the due date policy in the Terms of Use. A delivery delay is not considered in that case.</td>
</tr>
<tr>
<td></td>
<td>If the due date of the loan does not include hours/minutes, then the policy is activated only when the due date is a closed day. If the due date is an open day, then the due hour from the policy is used.</td>
</tr>
</tbody>
</table>

| **Maximum Renew Date** | The maximum amount of time after a lending request is sent that renewal of the request is permitted. Values: None/Other. If you select Other, enter a value and a unit of time measurement. |
| | For example, if the Maximum Renew Date policy has a value of 2 weeks, when using the Renew option on the lending side, the system blocks renewal if the due date after renewal is more than two weeks after the item was shipped. |
| | Additionally, if requests exist on an item which is being renewed, the renewal is rejected. If requests exist on the title that is being renewed, the renewal succeeds or is rejected based on the configured block preferences setting (see Configuring Block Preferences). |

| **Resource Sharing Recall Period** | The amount of time, in days, that a borrower has to return a recalled item. |
| | Values: None/Other. If you select Other, enter a value in days. |
| | For more information on recall requests, see Recall Requests. |

| **Expiration Date Management** | Currently under construction |

| **Grace Period** | The length of time that the item may be returned late with no fine being applied. |
| | If you define a grace period using the Days unit of measurement (as opposed to Exact Days or other units of measurement), 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 2 days, the end of the grace period is March 2, after which a fine is applied (so that if you use the Days unit of measurement, a grace period of 1 day is essentially meaningless). If you use the Exact Days unit of measurement, if the item’s due date is March 1 and the grace period is 2 days, the end of the
<table>
<thead>
<tr>
<th>Fulfillment Policy Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>grace period is March 3. The grace period applies to both regularly loaned items and recalled items.</td>
<td></td>
</tr>
<tr>
<td><strong>Note</strong></td>
<td>If the grace period passes and the item is not returned, the fine is applied retroactively to the due date.</td>
</tr>
<tr>
<td>Values: None/Other. If you select Other, select a value and a unit of time measurement.</td>
<td></td>
</tr>
<tr>
<td><strong>Is Loanable</strong></td>
<td>Whether a patron can borrow the item. An item on loan cannot be renewed. Values: True/False, In Reading Room Only. If In Reading Room Only is selected, when loaning from a circulation desk not defined as a reading room desk, staff will receive a block message. The block can be configured in Alma Block Preferences to allow an override by Operator/Manager. The block is also applicable to loaning from a self-check machine.</td>
</tr>
<tr>
<td><strong>Is Recallable</strong></td>
<td>Whether the library can recall the item if the item is on loan.</td>
</tr>
<tr>
<td>If this setting is True and <strong>Recalls Loans = No</strong> on the Loan Recalls (Request Configuration) mapping table, the loan is not recalled (see Configuring Loan Recall Requests). Only if <strong>Recalls Loans = Yes</strong> is the Terms of Use policy applied.</td>
<td></td>
</tr>
<tr>
<td><strong>Note</strong></td>
<td>An item can be renewed only if both <strong>Is Recallable</strong> is not enabled and <strong>Recalls Loans = No</strong> on the Loan Recalls mapping table (see Configuring Loan Recall Requests).</td>
</tr>
<tr>
<td><strong>Is Renewable</strong></td>
<td>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). When a request that has triggered a recall is canceled, that original, corresponding recall will be canceled.</td>
</tr>
<tr>
<td>When <strong>Is Recallable</strong> is selected and an item is recalled:</td>
<td></td>
</tr>
<tr>
<td>◦ The due date of the item is updated when the <strong>Recall Period</strong> 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 <strong>Recall Period</strong> value of 5 days, the item's due date is effectively May 12 (5 days after the item was recalled). Note that the current due date will not change, and will remain May 10.</td>
<td></td>
</tr>
<tr>
<td>◦ The overdue fine is increased when the <strong>Recalled Overdue Fine</strong> policy value is active and is greater than the <strong>Overdue Fine</strong> policy value. For example, if the <strong>Overdue Fine</strong> value is $5 and the <strong>Recalled Overdue Fine</strong> value is $10, a recalled item that is overdue incurs a fine of $10 instead of $5.</td>
<td></td>
</tr>
<tr>
<td>Values: True/False</td>
<td>For more information on recall requests, see Recall Requests.</td>
</tr>
<tr>
<td><strong>Lost Item Fine</strong></td>
<td>The amount to pay if the item is lost.</td>
</tr>
<tr>
<td>Values: None/Other. If you select Other, enter an amount to pay in the local currency.</td>
<td></td>
</tr>
<tr>
<td><strong>Lost Item Replacement</strong></td>
<td>This policy defines a replacement fee to apply when an item is lost.</td>
</tr>
<tr>
<td>Fulfillment Policy Type</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------</td>
<td>-------------</td>
</tr>
</tbody>
</table>
| Fee                    | Values: None/Other. If you select Other, enter a value in the local currency. Replacement costs can be set per item and in this policy. The possible scenarios for the application of this policy are:  
  - The item has a replacement fee and:  
    - the policy is set to **None** – result: the item's replacement fee is applied.  
    - the policy is set to **Other, Value** is set to a value greater than zero – result: the item's replacement fee is applied.  
    - the policy is set to **Other, Value** is set to 0 – result: no fee is applied.  
  - The item does NOT have a replacement fee and:  
    - the policy is set to **None** – result: no fee is applied.  
    - the policy is set to **Other, Value** is set to a value greater than zero – result: the policy fee is applied.  
    - the policy is set to **Other, Value** is set to 0 – result: no fee is applied. |
| Lost Item Replacement Fee Refund Ratio | The 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. Values: Enter a percentage value. |
| Maximum Renovation Period | The maximum amount of time for a loan. This value includes time added to the loan by renewals. Values: None/Other. If you select Other, enter a value and a unit of time measurement. For example, if this value is **21 days**:  
  - 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).  
  This value takes into account calendar days and not library open days. |
| Maximum Fine | The maximum amount that a patron can be fined in overdue fines for each loan. Values: None/Other. If you select Other, enter the maximum fine for a patron in the local currency. If **Value type = None**, there is no limit on the amount that a patron can be fined. |
| Overdue Fine | The amount that the patron must pay, per period, if the item was returned late. An item is considered overdue starting on the day after the due date. Values: None/Other. If you select Other, enter an amount to pay in the local currency for each time period, and the time period, as follows:  
  - **All Days** – All days in the given period.  
  - **All Hours** – All hours in the given period.  
  - **All Minutes** – All minutes in the given period.  
  - **Exact Calendaric Days** – All days in the given period from the same hour that the period started.  
  - **Exact Open Days** – All open days in the given period from the same hour that the period started.  
  - **Open Days** – All open days in the given period.  
  - **Open Hours** – All open hours in the given period. |
<table>
<thead>
<tr>
<th>Fulfillment Policy Type</th>
<th>Description</th>
</tr>
</thead>
</table>
| Overdue Notification Fine Type 1 | The amount the patron must pay for a "Type 1" overdue notification. See [Configuring Overdue and Lost Loan Profiles](#).  
Values: None/Other. If you select Other, enter the amount to pay in the local currency. |
| Overdue Notification Fine Type 2 | The amount the patron must pay for a "Type 2" overdue notification. See [Configuring Overdue and Lost Loan Profiles](#).  
Values: None/Other. If you select Other, enter the amount to pay in the local currency. |
| Overdue Notification Fine Type 3 | The amount the patron must pay for a "Type 3" overdue notification. See [Configuring Overdue and Lost Loan Profiles](#).  
Values: None/Other. If you select Other, enter the amount to pay in the local currency. |
| Overdue Notification Fine Type 4 | The amount the patron must pay for a "Type 4" overdue notification. See [Configuring Overdue and Lost Loan Profiles](#).  
Values: None/Other. If you select Other, enter the amount to pay in the local currency. |
| Overdue Notification Fine Type 5 | The amount the patron must pay for a "Type 5" overdue notification. See [Configuring Overdue and Lost Loan Profiles](#).  
Values: None/Other. If you select Other, enter the amount to pay in the local currency. |
| Recalled Overdue Fine | The amount that the patron must pay, per period, if a recalled item was returned late.  
When a placing a hold request, only the item that has been on loan the longest is recalled, while other items are blocked from renewal. If the recalled item is returned late, it is assigned a Recalled Overdue Fine, while other items due are assigned an Overdue Fine.  
Values: None/Other. If you select Other, enter a value and a unit of time measurement to define each period.  
For more information on recall requests, see [Recall Requests](#). |
| Recall Period | The amount of time that a patron has to return a recalled item.  
Values: None/Other. If you select Other, enter a value and a unit of time measurement.  

**Note**  
If a request already exists at the time the loan is created, the requested item due date policy is applied. |
| Reloan Limit | Prevents reloaning items to a patron that has just returned the item. A different copy of the same title with the same material type is considered as a single item for this policy. The policy type has three possible options:  
- None - there is no limit on borrowing copies of the same title. This is the prior functionality and the default.  
- Parallel - the patron may not check out two copies of the title at one time.  
- Other - you may define the time span (in the Unit of Measurement) in which the same item may not be loaned. |
<table>
<thead>
<tr>
<th>Fulfillment Policy Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>reloaned - minutes, hours, days, weeks, or months. Note that this option includes the Parallel option and blocks both parallel loans and same item loans in the specified time span. There is no option to block reloaning without blocking parallel loans. For more information, see Loaning Items.</td>
</tr>
<tr>
<td>Renew Fee</td>
<td>The amount that the patron must pay for renewing an item. Values: None/Other. If you select Other, enter a value in the local currency.</td>
</tr>
<tr>
<td>Requested Item Due Date</td>
<td>The length of time that the item may be borrowed (by default, two weeks) if the item is requested by another patron, when the item is not already on loan. Values: None/Other. If you select Other, enter a value and a unit of time measurement. For more information on recall requests, see Recall Requests.</td>
</tr>
<tr>
<td>Resource Sharing:</td>
<td></td>
</tr>
<tr>
<td>Allow Resource Sharing Requesting</td>
<td>Whether a patron can place a resource sharing borrowing request. Value: True/False</td>
</tr>
<tr>
<td>Resource Sharing Receive Fee</td>
<td>A default fee that is applied to resource sharing requests. The fee is applied when an item is received and scanned. Values: None/Other. If you select Other, enter a value in the local currency.</td>
</tr>
<tr>
<td>Resource Sharing Request Fee</td>
<td>This fee may be applied at the time that a borrowing request is created. It may be applied on requests coming in from external sources such as Primo requests or NCIP messages. Values: None/Other. If you select Other, enter a value in the local currency.</td>
</tr>
<tr>
<td>Is Requestable for Physical Resource Sharing</td>
<td>Whether a physical item can be requested to fulfill a resource sharing lending request. Values: True/False</td>
</tr>
<tr>
<td>Is Requestable for Digital Resource Sharing</td>
<td>Whether a digital item can be requested to fulfill a resource sharing lending request. Values: True/False</td>
</tr>
<tr>
<td>Active Resource Sharing Requests Limit</td>
<td>The maximum number of active resource sharing requests that a patron is allowed to have. The following request statuses will not be included when counting the number of requests for this policy: Completed, Canceled, Canceled by Patron, Cancel Requested, and Deleted. Active requests which were already returned from the patron to the library, but were not yet returned to the lender are ignored when calculating this limit. Values: None/Other. If you select Other, enter the maximum number of requests. If you select None, there is no limit to the number of requests.</td>
</tr>
<tr>
<td>Yearly</td>
<td>The maximum number of resource sharing requests that a patron is allowed to have in a given year. Deleted</td>
</tr>
<tr>
<td>Fulfillment Policy Type</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Resource Sharing Requests Limit</td>
<td>Requests are not considered in this count. The year is counted starting from the date that is configured in the <code>rs_yearly_ill_limit_start_date</code> parameter (See Configuring Other Settings). Values: None/Other. If you select Other, enter the maximum number of annual requests. If you select None, there is no limit to the number of requests.</td>
</tr>
</tbody>
</table>

**Request:**

| Hold Shelf Period | The length of time that a requested item can 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 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 (5 days on which the library is open and 2 days on which the library is closed). Values: Enter a number of days. |

| On Shelf Request Policy | The policy to use when on shelf items are requested. The available values are: Allow for pickup anywhere regardless of availability and Use fulfillment unit definition. Note This definition overrides the fulfillment unit's On Shelf Request Policy. |

| Is Digitizeable | Whether a patron can request a digital copy of the item. Values: True/False |

| Is Requestable | Whether a patron can request to borrow the item. Values: True/False |

| Personal delivery | Whether a patron can request personal delivery of the item. Values: select one of the following values to configure personal delivery:  
- **All** (Deliver items to a home or an office address)  
- **Home** (Deliver items only to a home address)  
- **None** (Do not deliver items at all)  
- **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 Adding User Contact Information) and there are no blocks on the user. |

<p>| Personal delivery fee | Whether a delivery fee is associated with the personal delivery of a physical item. Values: None/Other. If you select Other, enter the amount to pay in the local currency. Values: True/False. If this policy is set to True and the request is going to be canceled due to execution of either |</p>
<table>
<thead>
<tr>
<th>Fulfillment Policy Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>convert to resource sharing</td>
<td>Requests - Handle Expiration Step or Requests - Recalculate After Inventory Update, the unfulfilled request is converted to a resource sharing request with a status of Created borrowing request. The policy is activated only if the above mentioned jobs are active and determine that a hold request must be canceled due to the expiry of an existing matching physical inventory that can fulfill the request. Before converting, the following validations are performed: ◦ Pickup location is a circulation desk and not a library ◦ Resource sharing library doesn't have a Deliver To relation with the pickup location ◦ There is no default location for the resource sharing library ◦ Date Needed By is in the past If any of these are true, the request is not converted.</td>
</tr>
</tbody>
</table>

---

**Note**
A cancelation letter with the reason Converted to Resource Sharing Request is sent to the patron when a hold request is converted to a resource sharing request. Existing requests are canceled with the cancelation reason Converted to Resource Sharing Request.

---

| Pickup Locations | The locations where a patron can request to pick up a requested item. The available values are: ◦ At Any Institution ◦ At Any Reading Room ◦ At Library Reading Room ◦ In Campus - The campus to which the item's library belongs ◦ In Institution - Includes all of an institution's libraries, not only those whose circulation desk has a Hold Shelf ◦ In Library ◦ In Patron Affiliated Campus - The campus to which the patron belongs |

| Request Priority | The priority of a user's request in the request queue. For details on request priority, see Request Priority. Values: Highest, High, Medium, Low, Lowest |

<p>| 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. Values: None/Other. If you select Other, enter the amount to pay in the local currency. |
| Expiration Alert Period | The amount of time before the patron's card expires that a patron is alerted. This relates to the expiration of the user record and not to the Patron role. Values: Enter a number of days. |
| Patron Role Renewal Period | The amount of time by which the role of Patron for this user is renewed. |</p>
<table>
<thead>
<tr>
<th>Fulfillment Policy Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Values: None/Other. If you select Other, enter a value and a unit of time measurement.</td>
</tr>
<tr>
<td>Patron Registration Fee</td>
<td>The 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.</td>
</tr>
<tr>
<td></td>
<td>Values: None/Other. If you select Other, enter the amount to pay in the local currency.</td>
</tr>
<tr>
<td>Renew Scope</td>
<td>The scope in which a user’s Patron role can be renewed.</td>
</tr>
<tr>
<td></td>
<td>Values: Institution/Library</td>
</tr>
<tr>
<td>User Registration Fee</td>
<td>The amount to pay in local currency to register a new user. This applies to an internal user only. The fee is applied only when registering the user from Manage Patron Services.</td>
</tr>
<tr>
<td></td>
<td>Values: None/Other. If you select Other, enter the amount to pay in the local currency.</td>
</tr>
<tr>
<td>User Renewal Period</td>
<td>The amount of time by which a user’s registration is renewed (until the estimated date when the user is expected to leave the institution).</td>
</tr>
<tr>
<td></td>
<td>Values: None/Other. If you select Other, enter a value and a unit of time measurement.</td>
</tr>
<tr>
<td></td>
<td>For more information regarding authorization and authentication, see Expiration Date.</td>
</tr>
</tbody>
</table>

**Note**

For this policy, there is a known issue that Exact Days as a unit of measurement is not currently functional.

3. Select **Next**. The Policy Details page appears. This is the second page of the two-page wizard.

4. Enter a policy name (required) and policy description (optional).
5. In the **Value** field, select the relevant value to indicate that the policy is to be active. The values of this field vary, depending on the specified policy type (see above).

6. In the **Default policy** field, 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.

7. Select **Save**. The details of the policies are stored, and the policy is added to the list of policies.

---

**Note**

- Configured policies may override settings in other areas of Alma. For example, the **Is Renewable** policy value can override the value of the **Patron Renewal** setting when configuring a Workflow Profile.
- If you select **Edit** from the row actions list for a network policy (**Policy Owner = Network**), the policy is saved as an institution policy (**Policy Owner = Institution**). If you then select **Delete** from the row actions list for an institution policy that belongs to a network, the policy is deleted from the institution but is saved as a network policy (**Policy Owner = Network**).
- You cannot delete a Network Zone policy that has been linked at a member institution to an institution level Terms of Use, the policy. The Job Report page for failed records (select **View Failed Records** from the row actions list) displays the link, **Could not delete. Terms of Use are connected to this policy**. You can select the link to view the policy. The policy is modified from being a network policy to being an institution policy.
- When creating a network policy with a fixed value type (**Value Type = Fixed**), a value (event) can be selected only if the member institutions are configured with an event of the same name.
- The Alma interface must be set to English to add fulfillment policies.

---

### Configuring Item Policies

To configure item policies, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Item policies create exception rules in the fulfillment unit rules so that specific items in a certain location will circulate differently than the typical items stored in this location. See Configuring a Request.

You configure item policies on the Item Policy Code Table page (**Configuration Menu > Fulfillment > Physical Fulfillment > Item Policy**). You should define item policies on the institution level only; defining library-level item policies is strongly discouraged.

Modifying an item policy may have implications for several functional areas in Alma. Ensure that you properly coordinate any changes that you make.
In a collaborative network, you can create policies in the Network Zone and then distribute them to member institutions. For more information, see Configuring Fulfillment Information in the Network Zone.

**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 Configuring filter on the Fulfillment Configuration page.

**To add or edit a new item policy:**

Add an item code and description. See Code Tables.

**Note**

The Default value parameter is not supported in this table and should not be used. Similarly, the Move Up and Move Down buttons do not have an effect on the order in which the item policies are displayed in drop-down lists.

To configure an item policy so that all of the items associated with the policy are not available for resource sharing, see Configuring Item Policy Exceptions.

**Configuring Terms of Use**

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. Terms of Use 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 Fulfillment Policies.

The fulfillment unit rules determine which Terms of Use to employ when delivering a particular service to the patron. For
details, see Configuring Fulfillment Units, Policies, and Terms of Use.

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).

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 Terms of Use based on the default policies.

An item’s Terms of Use is re-calculated each time an activity is performed on a loaned item (such as renewal). Therefore, any change in a policy, fulfillment rule, patron information, or item information has an immediate effect on a loan’s or request’s Terms of Use.

You configure Terms of Use on the Terms of Use Management page (Configuration Menu > Fulfillment > Physical Fulfillment > Terms of Use and Policies).

Terms of Use Management Page

In a collaborative network, you can create terms of the use in the Network Zone and then distribute them to member institutions. For more information, see Configuring Fulfillment Information in the Network Zone.

Note

Ensure that you are within the context of the institution/library whose Terms of Use you want to configure by selecting the required institution/library from the Configuring filter on the Fulfillment Configuration page.

Select 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:

- Add a set of Terms of Use (see Adding a Set of Terms of Use)
- Edit a set of Terms of Use (Select Edit from the row actions list.)
- View a set of Terms of Use (Select View from the row actions list.)
• Delete a set of Terms of Use (Select Delete from the row actions list.)
• View the fulfillment rules related to the Terms of Use (see Viewing Related Fulfillment Rules)

**Note**

- You can permanently delete a Terms of Use record only if the owner is the **Institution**. If the owner is **Generic**, you cannot delete the record.
- A Terms of 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 (**Configuration Menu > Fulfillment > Physical Fulfillment > Terms of Use and Policies**), select **Add a Terms of Use**. The Select Fulfillment Terms of Use Type page appears. This is the first page of a three-page wizard.

   ![Select Fulfillment Terms of Use Type Page](image)

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 related to resource sharing borrowing requests and fees
   - **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
     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. Select **Next**. The second page of the three-page wizard appears.

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 were defined. For details, see [Configuring Fulfillment Policies](#).

   For descriptions of the policies, see [Fulfillment Policy Types in Adding Fulfillment Policies](#). Values selected on this page for the specified Terms of Use override the values configured in Fulfillment Configuration.

   - To add a new policy, select **Add** from the row actions list. For more information, see [Adding Fulfillment Policies](#).
   - To edit a policy, select **Edit** from the row actions list. For more information, see [Configuring Terms of Use](#). Editing a policy changes the policy and makes the change in all Terms of Use already using this policy.
   - To add a new policy that is a duplicate of the currently selected policy, select **Duplicate** from the row actions list. A new policy is created, attached to the current Terms of Use; you can then edit the new policy. For more information, see [Configuring Terms of Use](#).

6. Select **Next**. The third page of the wizard appears.
7. Review the details of the new terms of use. Select Back to make changes to the Terms of Use.

8. Select Save to store the details of the new set of Terms of Use. The new set of Terms of Use is added to the list. If necessary, use the available filter and search controls to locate the new Terms of Use in the list. For details on Terms of Use, see Configuring Terms of Use.

9. To view a Terms of Use record, select View from the row actions list. A page detailing the Terms of Use appears. Select Back to return to the Terms of Use Management page.

You can configure that a user registration terms of use is applied automatically to newly added users; see Configuring User Registration Rules.

To configure a Terms of Use 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 Adding a Set of Terms of Use.

2. On the Fulfillment Units List page (Configuration Menu > Fulfillment > Physical Fulfillment > Fulfillment Units), select the Change Organization Unit link.
The Organization Units List page appears.

3. Locate the Resource Sharing Library entry and select Choose from the row actions list. The Fulfillment Units List page displays the fulfillment units associated with the resource sharing library.

4. Select Edit from the row actions list of a fulfillment unit. The Edit Fulfillment Unit page appears.

5. Select the Fulfillment Unit Rules tab.

6. In the Rule Type field, select Borrowing Resource Sharing to display the resource sharing borrowing rules.

7. Select Add Rule. The Fulfillment Unit Rules Editor page appears.

8. Configure a rule, adding the Terms of Use you configured above.

9. Select 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 (Admin > User Management > Manage Users). Select the Contact tab and add an address in the Addresses section (see Managing Users).

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 Terms of Use:

1. On the Terms of Use Management Page (Configuration Menu > Fulfillment > Physical Fulfillment > Terms of Use and Policies), select Show Related Fulfillment Rules from the row actions list. The Related Fulfillment Rules page appears.

The fulfillment rules that are using the selected Terms of Use appear in the table.

2. Optionally, you can do the following:

   ◦ Select the link in the Rule Name column to open the Fulfillment Unit Rules Editor page for the selected rule.
Configuring Request Priorities

When a physical item request is made for a non-available item, automatic prioritization may be established to assign a higher queue location to higher priority users.

To configure request priorities:

1. Create a request Terms of Use (Configuration Menu > Fulfillment > Physical Fulfillment > Terms of Use and Policies).
2. Locate the Request Priority policy.
3. Select Highest policy (or create one) from the Request Priority drop-down and save the Terms of Use.
4. From the Fulfillment Units list (Configuration Menu > Fulfillment > Physical Fulfillment > Fulfillment Units), add or edit an existing fulfillment unit.
5. Select the Fulfillment Unit Rules tab.
6. Select Add Rule
7. In the Input Parameters section, Select Add Parameter. Select the user group that will get highest priority.
8. In the Output Parameters section, select the terms of use created in step 3.

Configuring Block Preferences

To configure block preferences, you must have one of the following roles:

- General System Administrator
Block preferences let you control how various scenarios are handled at circulation desks within the institution based on an item’s or user’s status. For more information on blocking users, see Blocking and Unblocking Users. When an item is blocked it can’t be loaned to the user; see Creating a Request from 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 was 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 appear on the Block Preferences page (Configuration Menu > Fulfillment > Physical Fulfillment > Block Preferences).

Block Preferences Page

Note

- Block preferences can be configured at the institution level only. Select the required institution from the Configuring filter on the Fulfillment Configuration page.

- The Not Renewable – Item Has Request(s) entry indicates the system behavior when there are title level requests on the renewed item. Select Handle Automatically to permit request renewal when title level requests exist for the loaned item that is being renewed. Select any other option to reject loan renewal when title level requests exist for the loaned item that is being renewed. This parameter also controls the system behavior when attempting to renew material that was shipped for a lending resource sharing request (using resource sharing request renew) and there are title level requests for the resource. If you select Handle Automatically, it means that renewal requests will be automatically accepted and the shipped material is automatically renewed to the requested new due date even though there are title level requests for the resource. Select any other option to reject the renewal requests.

- The Item cannot be loaned to patron – insufficient due date block indicates that the item cannot be loaned because the due date does not allow the item to be returned. For example, this block appears when an item’s due date is in the past, or when an item is due tomorrow but delivery of the item cannot be completed for 3 days.

The list of block preferences is predefined. You cannot add or delete a block preference, but you can modify a block preference’s settings. The preferences that you set apply to all libraries within the institution.
Editing 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**
  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.
- **Override in Another Institution** - This option may be used by Fulfillment Network members to configure whether the block may be overridden by staff in another institution if the block happens when the member’s item is being loaned at the circulation desk of another member institution.
- **Handle Automatically** – 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.

**Note**

- The block preferences **Item has not been received by Acquisitions Department, Item cannot be loaned due to booking request, Item cannot be loaned to patron - insufficient due date, A resource sharing request must be renewed by the resource sharing library, 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).
- 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.
- Selecting an override action for the **Item is Not Renewable** preference causes the Override button to appear on the warning box from the Renew option on the Action button of the Manage Patron Services Loan tab. It does not affect the Renew Selected or Renew All buttons.
The block preferences descriptions are:

<table>
<thead>
<tr>
<th>Block Name</th>
<th>Description</th>
<th>Available Actions</th>
<th>Handlers</th>
</tr>
</thead>
<tbody>
<tr>
<td>The loan regular due date conflicts with booking request</td>
<td>Check out is blocked when the normal due date (as determined by the TOU, for example) conflicts with the start of an existing booking request.</td>
<td>• Block • Override by All • Override by Manager • Override by Operator • Handle Automatically</td>
<td>Shorten the due date to the last possible date</td>
</tr>
<tr>
<td>The renew due date conflicts with booking request</td>
<td>Renewal of an existing loan is blocked when the normal renewed due date (as determined by the TOU, for example) conflicts with the start of an existing booking request.</td>
<td>• Block • Override by All • Override by Manager • Override by Operator • Handle Automatically</td>
<td>Shorten the due date to the last possible date</td>
</tr>
<tr>
<td>Item is not loanable</td>
<td>Check out of an item is blocked as a result of the fulfillment configuration. The applicable Terms of Use contains an Is Loanable policy with value False.</td>
<td>• Block • Override by All • Override by Manager • Override by Operator</td>
<td></td>
</tr>
<tr>
<td>Item is not renewable</td>
<td>Loan renewal is blocked as a result of the fulfillment configuration. The applicable Terms of Use contains an Is Renewable policy with value False.</td>
<td>• Block • Override by All • Override by Manager • Override by Operator</td>
<td></td>
</tr>
<tr>
<td>Item cannot be loaned to patron - insufficient due date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>This item can only be loaned from reading room desk</td>
<td>If an item’s Is Loanable policy has a value of In Reading Room Only, and the loan is attempted from a circulation desk not defined as a reading room desk, check out is blocked.</td>
<td>• Block • Override by All • Override by Manager • Override by Operator</td>
<td></td>
</tr>
<tr>
<td>Block Name</td>
<td>Description</td>
<td>Available Actions</td>
<td>Handlers</td>
</tr>
<tr>
<td>------------</td>
<td>-------------</td>
<td>-------------------</td>
<td>----------</td>
</tr>
<tr>
<td>Item does not belong to this institution</td>
<td>Check out is blocked for an item when the item is on the hold shelf.</td>
<td>Block</td>
<td></td>
</tr>
<tr>
<td>Item is on Hold Shelf for this patron</td>
<td>Check out is blocked for an item when the item is on the hold shelf. <strong>Note</strong> This should be set to <strong>Handle Automatically</strong>.</td>
<td>• Block</td>
<td>Delete the request and loan the item</td>
</tr>
<tr>
<td>Item is bound to a borrowing request for another patron</td>
<td>Check out is blocked for an item that was received for a borrowing request and then returned.</td>
<td>• Block</td>
<td></td>
</tr>
<tr>
<td>Item cannot be loaned due to booking request</td>
<td></td>
<td>• Block</td>
<td></td>
</tr>
<tr>
<td>Item has not been received by Acquisitions Department</td>
<td></td>
<td>Block</td>
<td></td>
</tr>
<tr>
<td>Item is requested by another patron</td>
<td>Check out of an item to a patron is blocked when there is an active request for the item by another patron. The block has no effect if the request is not active.</td>
<td>• Block</td>
<td>Restart the request, since the item is no longer available.</td>
</tr>
<tr>
<td>Item renew period exceeded</td>
<td>Renewal of a loan is blocked as a result of the fulfillment configuration. The applicable Terms of Use contains a value for the Maximum Renewal Period policy which has already been reached for this loan.</td>
<td>• Block</td>
<td></td>
</tr>
</tbody>
</table>

Ex Libris, a ProQuest Company
<table>
<thead>
<tr>
<th>Block Name</th>
<th>Description</th>
<th>Available Actions</th>
<th>Handlers</th>
</tr>
</thead>
</table>
| Item cannot be loaned from this circulation desk | • blocks loan of an item from the circulation desk of the item’s current location because the circulation desk does not provide check-out services for that location.  
• blocks loan of an item from the circulation desk(s) of a library that does not have a Circulate For relationship with the library of the item’s current location. | • Block  
• Override by All  
• Override by Manager  
• Override by Operator  
• Handle Automatically | Operator                                    |
| Item cannot be returned at this circulation desk | • blocks return of an item at the circulation desk of the item’s current location because the circulation desk does not provide check-in services for that location.  
• blocks return of an item at the circulation desk(s) of a library that does not have a Circulate For relationship with the library of the item’s current location. | • Block  
• Override by All  
• Override by Manager  
• Override by Operator  
• Handle Automatically |                                      |
| Item of the same title was recently loaned to this patron | Reloaning an item is blocked as a result of the fulfillment configuration. The applicable Terms of Use contains a Reloan Limit policy with value Other. | • Block  
• Override by All  
• Override by Manager  
• Override by Operator |                                      |
| Item of the same title is already on loan for this patron | Loaning an item is blocked as a result of the fulfillment configuration. The applicable Terms of Use contains a Reloan Limit policy with value Parallel or Other. | • Block  
• Override by All  
• Override by Manager  
• Override by Operator |                                      |
| The loan cannot be renewed due to the loan status | Renewal of a loan is blocked when the loan status is Lost, Claimed Returned, or Recalled. Note that blocks for lost items cannot be overridden. | • Block  
• Override by All  
• Override by Manager  
• Override by Operator |                                      |
<table>
<thead>
<tr>
<th>Block Name</th>
<th>Description</th>
<th>Available Actions</th>
<th>Handlers</th>
</tr>
</thead>
</table>
| Item is on hold shelf for another patron | Check out is blocked for an item that is currently on the hold shelf for a different patron. | • Block  
• Override by All  
• Override by Manager  
• Override by Operator  
• Handle Automatically | Restart the request, since the item is no longer available |
| Patron cash limits has exceeded | Loaning and/or renewing an item is blocked for a patron with a current bill that exceeds the allowed limit for that patron group (as configured in the Users tab). Select the desired action(s) to block from the Blocks column: Loan, Renew, or Both. | • Block  
• Override by All  
• Override by Manager  
• Override by Operator | |
| Patron's card has expired | Loaning an item is blocked for a patron with an expired user record. | • Block  
• Override by All  
• Override by Manager  
• Override by Operator | |
| Patron is not active | Loaning an item is blocked for a patron with an inactive user record. | • Block  
• Override by All  
• Override by Manager  
• Override by Operator | |
| Patron loan limit exceeded | Loaning an item is blocked for a patron with current loans that exceed the allowed number for that patron group (as configured in the Users tab). | • Block  
• Override by All  
• Override by Manager  
• Override by Operator | |
| Patron overdue limits exceeded | Loaning and/or renewing an item is blocked for a patron with overdue loans that exceed the allowed number for that patron group (as configured in the Users tab). Select the desired action(s) to block from the Blocks column: Loan, Renew, or Both. | • Block  
• Override by All  
• Override by Manager | |
<table>
<thead>
<tr>
<th>Block Name</th>
<th>Description</th>
<th>Available Actions</th>
<th>Handlers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patron overdue recalls limit exceeded</td>
<td>blocks loaning and/or renewing an item to a patron with overdue recalled loans that exceed the allowed number for that patron group (as configured in the Users tab). Select the desired action(s) to block from the Blocks column: Loan, Renew, or Both.</td>
<td>• Override by Operator</td>
<td></td>
</tr>
<tr>
<td>Not Renewable – Item has Request(s)</td>
<td>blocks renewal of additional copies of an item that has been recalled.</td>
<td>• Block</td>
<td>• Override by All</td>
</tr>
<tr>
<td>Item is currently on loan by another patron</td>
<td></td>
<td>• Override by All</td>
<td>• Override by Manager</td>
</tr>
<tr>
<td>A resource sharing request must be renewed by the resource sharing library</td>
<td></td>
<td>• Override by Operator</td>
<td>• Override by Operator</td>
</tr>
<tr>
<td>Item has not been received by resource sharing operator</td>
<td></td>
<td>• Handle Automatically</td>
<td>• Handle Automatically</td>
</tr>
</tbody>
</table>

Ex Libris, a ProQuest Company
<table>
<thead>
<tr>
<th>Block Name</th>
<th>Description</th>
<th>Available Actions</th>
<th>Handlers</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>User does not have a patron role or the role has expired</td>
<td>• Block</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Override by All</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Override by Manager</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Override by Operator</td>
<td></td>
</tr>
</tbody>
</table>

Note that requests are not blocked in Alma. The rationale behind this is to allow patrons to place the request, but when they come to pick up the item, to force them to pay/return/solve the reason of their blockage before in order to receive the requested item. However, you can still creates block on requests by creating blocks manually: when configuring a block manually, you choose which actions will be blocked.

The Block 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 Block Preferences page (*Configuration Menu > Fulfillment > Physical Fulfillment > Block Preferences*), locate the block preference that you want to edit.
2. In the **Actions** column, select a different action, as needed. The lists of available actions are predefined, and vary from scenario to scenario. Note that many scenarios have only one action, **Block**.
3. In the **Handlers** column, select a different handler, as needed. 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.
4. In the **Blocks** column, 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.
5. Select **Save** to store the modified block preferences in the system.

### Configuring Automatic Loan Renewal Rules

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 are renewed by the **Notifications - Send Courtesy Notices and Handle Loan Renewals** job. Also see the parameter **auto_renew_loan_days** (see *Configuring Other Settings*), which sets the number of days before a loan is due that an automatic renewal attempt triggers.

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.
Even where the rules allow for renewal, the renewal may still be prevented in situations such as the following:

- The user does not have a patron role or the role has expired.
- The user record will expire before the renewal date.
- The due date is already set to the renewed due date.
- The patron is inactive.
- The patron's card has expired.
- The patron has exceeded the limit of overdue recalls.
- The patron has exceeded the limit of cash.
- The item is not renewable.
- The item has a status that prevents renewal.
- The item renew period has been exceeded.
- Renewing the loan conflicts with a booking request and the due date must be shortened.
- The item cannot be loaned due to a booking request.
- The item cannot be renewed due to a request for the item.
- The auto-renewal rule is set to false.
- A general error caused the renewal failure.

Loans that are not renewed because of pending requests are automatically 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. Loans that are a result of resource sharing borrowing requests cannot be renewed using this job.

If a loan was handled by this job but renewal was prevented due to one of the other 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, see Notifications – Send Courtesy Notices and Handle Loan Renewals.

You configure automatic loan renewal rules from the Automatic Loan Renewal Rules page (Configuration Menu > Fulfillment > Physical Fulfillment > Auto Loan Renewal Rules).
The following actions can be performed on this page:

- Add automatic loan renewal rules (see Adding Automatic Loan Renewal Rules)
- Edit automatic loan renewal rules (select Edit from the row actions list).
- Enable or disable loan renewal rules
- Duplicate automatic loan renewal rules (select Duplicate from the row actions list and modify the relevant fields)
- Delete automatic loan renewal rules (select Delete from the row actions list).

You cannot delete or disable 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, select Duplicate in the row actions list to duplicate an existing rule and then edit it (see Editing Automatic Loan Renewal Rules).

To add a new automatic loan renewal rule:

2. Enter a name (required) and a description (optional) for the new rule.
3. In the Input Parameters section, select Add Parameter. 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. The set of input parameters is added to the list of parameters for the automatic loan renewal rule.
4. Repeat the previous step 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.

5. Under Output Parameters, select whether auto renewal will be applied (True) or will not be applied (False).
6. Select Save to store the new rule.
7. 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.
Configuring Overdue and Lost Loan Profiles

To configure overdue and lost loan profiles, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

The overdue and lost loan profiles monitor long overdue loans and turn them into lost loans when applicable. The profiles send progressive reminders to the patron as well as creating fees and user blocks. The profile setup allows for flexibility to apply the rules based on type of loan and the amount of time that the loan is overdue. The notifications may be configured, with up to five different letters able to be easily created within the profile. If the profile is set to create a fine, the amount for the fine is set by the profile type and the applicable Terms of Use policy.

The profiles may be configured with one or more of the following options:

- Execution is based on the number of days after either the due date or a specific status change.
- Loans may be selected by particular statuses, materials, or location types.
- Notifications sent are determined by the letter send format.
- Up to five notification types can be sent out by default, though more can be created if necessary.

For more information on use cases and configuration options for overdue and lost loans, see the Alma Matters session on Lost and Overdue Loans.

You can configure the criteria according to which Alma:

- Sends a warning to a patron that he or she has an overdue loan
- Marks overdue loans as lost

You configure these criteria and their associated actions using profiles. Alma runs a daily job (Loans - Overdue and Lost Item) to process overdue and lost loans, which, according to the list of profiles, determines the loans for which warnings are sent and those that are defined as lost.

A single notification is sent to a patron for each overdue profile that matches the defined criteria, listing all of the overdue items. For example:

- Notification Profile 1 sends a notification message for all items that are 3 days overdue.
- Notification Profile 2 sends a notification message for all items that are 5 days overdue.

The letter sent depends on the setting of the switch_to_overdue_and_lost_loan_new_job parameter. When set to true, the notification sent is the Ful Overdue and Lost Loan Notification Letter. When set to false, the notification sent is the Ful Lost Loan Letter.

An invoice letter, Ful Overdue and Lost Loan Letter is sent to a patron for the lost profile that matches the defined criteria, listing all lost items.

To configure these letters, see Configuring Alma Letters.

If the Loans - Overdue and Lost Item job runs every day, the notification is sent after 3 days and again after 5 days (once for each matching profile).
The `switch_to_overdue_and_lost_loan_new_job` user parameter determines which letter is sent to the patron. Additionally, the parameter must be set to `True` for user blocks to be applied. For more information, see Configuring Other Settings.

You configure overdue and lost loan profiles on the Overdue and Lost Loan Profile List page (Configuration Menu > Fulfillment > Physical Fulfillment > Overdue and Lost Loan Profile).

Adding an Overdue and Lost Loan Notification

You can add overdue and lost loan warning profiles to an institution. These profiles determine the criteria by which the

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system sends overdue warnings for loans. The warnings do not affect the loan status; they inform the patron of the number of days upon which the loan is considered lost. A single overdue or lost item notification per notification type may be sent to the patron listing all of the patron's overdue or lost loans.

You can configure 5 types of notifications and their corresponding letters. After configuring the notification types, you then configure the profiles that will trigger these notification types.

To configure the fines for overdue and lost loan notification types:

1. On the Terms of Use Management page (Configuration Menu > Fulfillment > Physical Fulfillment > Terms of Use and Policies), filter by Terms of Use Type = Loan.
2. Select Edit from the row actions list for the relevant Terms of Use. The Terms of Use Details page appears.
3. Locate the relevant Overdue Notification Fine Type entry on the bottom of the page, and select Add Policy from the row actions list. The Policy Details page appears.
4. Enter a Name and Value in the relevant fields, and ensure that Value Type = Other.
5. Select Save. The policy is added to the notification fine type on the Terms of Use Details page.

Additionally, the configured Terms of Use appears on the Fulfillment Configuration Utility page (Fulfillment > Advanced Tools > Fulfillment Configuration Utility) when you enter a Patron Identifier and Item Barcode.

The amount configured for Overdue Notification Fine Type 1 is charged if a profile configured with Overdue Notification Fine Type 1 is triggered. The same applies for the other fine types.

For details on configuring the Overdue and Lost Loan Notification Letter that is sent to patrons, see Configuring Letter Labels. Modify the fields additional_info_*_type1, inform_you_item_below_type1, and charged_with_fines_fees_type1 to change overdue notification type 1, and so forth.

Note

In order for the additional elements, for instance additional_info_1_type1 through additional_info_1_type5, to appear on the Ful Overdue and Lost Loan Notification letter, you also need to customize the letter XSL. For detailed information specific to this letter, see Overdue and Lost Loan Notification Letter XSL Considerations, below. For information on the use of XSL in customizing letters in general, see Customizing Letter XSL Style Sheets.

Adding an Overdue 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 (for the replacement fee) to the borrowing patron.

To add an overdue and lost loan profile:

1. On the Overdue and Lost Loan Profile List page (Configuration Menu > Fulfillment > Physical Fulfillment > Overdue and Lost Loan Profile), select Add Overdue and Lost Loan Profile. The Overdue and Lost Loan Profile Record page appears.

Note

If you want to create a copy of an existing overdue and lost loan profile, select Duplicate from the row actions...
list. Once you have copied the profile, you can modify it as needed.

2. Enter the profile name and a description of the profile (if desired), and specify the criteria by which an overdue loan is 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.

Note

- When viewing a loan in Loan History, a loan’s initial **Loan Status** is **Loan**. As seen in Loan History, a **Loan Status** of **Normal** indicates a return to normal status after being in some other status. For example, to indicate five days after the loan was created, select a **Loan Status** of **Loan** and enter a **Days After Status Date** of 5. For more information on loan statuses, see Viewing Loan History.
- You can select multiple, predefined options for **Loan Status**, **User Group**, **Item Policy**, and **Material Type** while holding the CTRL key. These options are governed by a Boolean OR operator.
- The profile will be activated for loans that meet all the conditions specified in the profile. If the profile is set to mark the loan as lost, the loan is considered a lost loan (that is, a Boolean AND operator operates between fields). If the profile is set to mark the loan as overdue, then a notice will be sent and blocks/fines will be created, as per the profile configuration.
- The **Library** field refers 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.
- If a due date is changed on an already overdue loan, an overdue fine is created before the due date is updated (similar to the the renew process) to make sure that a potential overdue fine is not automatically dropped. This behavior is determined by the **overdue_at_change_due_date** parameter. See Configuring Other Settings.
3. To enable the profile, select the **Active** check box. The lost loan job processes only active profiles. You can disable/enable the profile at any time 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 **Run Now** from the row actions list.

4. For setting the criteria for a Lost profile, in the **Profile Type** field, select **Change to Lost**. The **Send Notification**, **Create Fine** and **Create Block** fields disappear (they are not relevant for this selection). For setting the criteria for notification profiles, in the **Profile Type** field, select an **Overdue Notification type (1 through 5)**.

5. For an overdue notification, select **Send Notification** to send the patron a notification letter matching the selected Profile type.

6. For an overdue notification on an item that is overdue and not returned, select **Create Overdue Loan Fine** to apply an overdue fine for the item when the job runs. For the notification to be generated, the fine must also be created in the Terms of Use, under the relevant **Overdue Notification type (1 through 5)** policy.

   This is a separate fine than the overdue fine policy which is applied upon returning the loaned item.

7. For both overdue and lost notifications, select **Create Overdue Notification Fee** to enable a notification fee. This field is only visible and applicable when using the aggregated notification method (i.e. the `switch_to_overdue_and_lost_loan_new_job` parameter in the customer parameters mapping table is set to true). Selecting the check box allows your institution to charge a fee per warning letter, rather than per loan.

8. For both overdue and lost notifications, enter **Overdue Notification Fee Amount** to set the notification fee. This field appears only when the **Create Overdue Notification Fee** check box is selected. When it appears, it is a mandatory field.

9. For an overdue notification, select **Create Block** to impose a user block while the loan is overdue. When **Create Block** is selected, a **Block Type** appears. The values in this drop down are defined in the **User Block Description** page (see **Configuring User Blocks Due to Overdue Loans**). The block is removed when the item is returned or lost, or the loan is deleted.

10. In the **Days After Due Date** field, enter the number of days after the due date upon which the warning notification message is to be sent. Select either **Days** or **Open Days** to determine if the number of days is calculated by calendar days or by the days that the library is open.

   For example, if an item’s due date is March 1, **Days After Due Date = 14**, and **Days** is selected, the item is considered lost on March 15.

   **Note**

   This calculation does not ignore days on which the library is closed. For example, if the **Days after due date=14**, the system’s calculation is based on 14 calendar days.

11. In the **Days After Status Date** field, indicate the number of days after an update to the value of the **Loan Status** field that the item is considered lost. The Loan Status field refers to values such as **Normal**, **Renewed**, **Automatic Renewal**, and **Overdue Notification**. The number of days is calculated by calendar days.

   For example, If **Loan Status** is defined as **Claim Returned** and **Days After Status Date** is 5, then Alma checks that the current loan status is **Claim Returned** and that the last change of the item loan was to **Claim Returned** and more than 5 days passed since the last item loan change. So if an item’s loan status is updated on April 1 and **Days After Status Date = 5**, the item is considered lost on April 6. (Note that a value of 0 is the same as leaving the field empty.)
12. When you are done, select **Save**. The profile appears on the Overdue and Lost Loan Profile page.

All active Overdue and Lost Loan profiles are processed by the Overdue and Lost Item job. See [Viewing All Scheduled Jobs](#). If the overdue profile contains an Overdue Notification Fee, the fee will be recorded for each user with the profile type and names of all profiles that were aggregated. If profiles of the same overdue profile type have different Notification Fee Amounts, they will not be aggregated. They will be separated into two letters. Each one of those letters will create an Overdue Notification Fine.

When adding a new profile or modifying a profile name, a message is displayed to prompt the user to run the Status Update. It is recommended to run Status Update for the for updated profile.

---

**Loans Overdue Notification Status Update**

The **Loans Overdue Notification Status Update** page (**Fulfillment > Advanced Tools > Loans Overdue Notification Status Update**) allows the user to run the Overdue and Lost Loan job without creating blocks or fines and fees, without changing the loan to lost, and without generating notifications. It is visible on the Fulfillment Advanced Tools for users with the Fulfillment Administrator role when the `switch_to_overdue_and_lost_loan_new_job` parameter is set to `true`. The affected loans will be marked to prevent them from getting the same notifications a second time when the job runs again. Running this job will irreversibly mark the loan records so they will not be handled by the matching profiles again.

Running the job displays a warning that the loan records will be modified.

---

**Overdue and Lost Loan Notification Letter XSL Considerations**

There are up to five notification types that may be used within the Ful Overdue and Lost Loan Notification Letter. Because the single letter format contains all five scenarios you may need to customize your letter with XSL if clauses. For example,

- `inform_you_item_below_type1` belongs to Overdue notification type 1
- `inform_you_item_below_type2` belongs to Overdue notification type 2
- `inform_you_item_below_type3` belongs to Overdue notification type 3
- `inform_you_item_below_type4` belongs to Overdue notification type 4
- `inform_you_item_below_type5` belongs to Overdue notification type 5

To implement these types correctly in the letter, replace the following section in the letter:

```xml
<table cellspacing="0" cellpadding="5" border="0">
  
</table>
```

Note

The value of this field also applies to migrated loans, according to the loan’s creation date.
With:

```xml
<xsl:for-each select="notification_data">
  <xsl:if test="/notification_data/notification_type='OverdueNotificationType1'">
    <table cellspacing="0" cellpadding="5" border="0">
      <tr>
        <td>
          <h>@@inform_you_item_below_type1@@</h>
          <h>@@borrowed_by_you@@ @@declared_as_lost_type1@@</h>
        </td>
      </tr>
    </table>
  </xsl:if>
  <xsl:if test="/notification_data/notification_type='OverdueNotificationType2'">
    <table cellspacing="0" cellpadding="5" border="0">
      <tr>
        <td>
          <h>@@inform_you_item_below_type2@@</h>
          <h>@@borrowed_by_you@@ @@declared_as_lost_type2@@</h>
        </td>
      </tr>
    </table>
  </xsl:if>
</xsl:for-each>
```

Similar for the additional_info_<1-5>, replace:

```xml
@@additional_info_1@@
<br />
@@additional_info_2@@
```

with:

```xml
<table>
  <xsl:choose>
    <xsl:when test="notification_data/notification_type = 'OverdueNotificationType1' ">
      <tr>
        <td>
          <font size="5">@@additional_info_1_type1@@</font><p><font size="2">@@additional_info_2_type1@@</font></p>
        </td>
      </tr>
    </xsl:when>
  </xsl:choose>
</table>
```
### Configuring Loan Recall Requests

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 Request Configuration mapping table for loan recalls (Configuration Menu > Fulfillment > Physical Fulfillment > Loan Recalls Configuration). For more information about mapping tables, see Mapping Tables.

The definitions of the different types are as follows:

<table>
<thead>
<tr>
<th>Code</th>
<th>Type</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>BOOKING</td>
<td>Booking request</td>
<td>Patron booking request</td>
</tr>
<tr>
<td>ELECTRONIC_TO_DIGITIZATION</td>
<td>Patron electronic digitization request</td>
<td>Patron digitization request for electronic resource</td>
</tr>
<tr>
<td>GENERAL_DIGITIZATION</td>
<td>General digitization request</td>
<td>Patron digitization request for item that is not catalogued</td>
</tr>
<tr>
<td>GENERAL_HOLD</td>
<td>General hold request</td>
<td>Patron physical item request for item that is not catalogued</td>
</tr>
<tr>
<td>LIBRARY ELECTRONIC_DIGITIZATION</td>
<td>Library electronic digitization request</td>
<td>Digitization request from reading list for electronic resource</td>
</tr>
<tr>
<td>Code</td>
<td>Type</td>
<td>Meaning</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>------------------------------------</td>
<td>--------------------------------------------------------</td>
</tr>
<tr>
<td>LIBRARY_PHYSICAL_DIGITIZATION</td>
<td>Library physical digitization request</td>
<td>Digitization request from reading list for physical resource</td>
</tr>
<tr>
<td>MOVE_TO_PERMANENT</td>
<td>Move permanently</td>
<td>Request for physical item to be moved to new location</td>
</tr>
<tr>
<td>MOVE_TO_TEMPORARY</td>
<td>Move temporarily</td>
<td>Request for physical item to be temporarily moved to new location</td>
</tr>
<tr>
<td>PATRON_PHYSICAL</td>
<td>Patron physical item request</td>
<td>Patron physical item request</td>
</tr>
<tr>
<td>PHYSICAL_TO_DIGITIZATION</td>
<td>Patron digitization request</td>
<td>Patron digitization request for physical resource</td>
</tr>
<tr>
<td>RESOURCE_SHARING_E2D_SHIPMENT</td>
<td>Ship digitally from electronic</td>
<td>Internal digitization request by resource sharing staff for electronic resource</td>
</tr>
<tr>
<td>RESOURCE_SHARING_P2D_SHIPMENT</td>
<td>Ship digitally</td>
<td>Internal digitization request by resource sharing staff for physical resource</td>
</tr>
<tr>
<td>RESOURCE_SHARING_PHYSICAL_SHIPMENT</td>
<td>Ship physically</td>
<td>Internal physical item request by resource sharing staff</td>
</tr>
<tr>
<td>RESTORE</td>
<td>Restore item</td>
<td>Restore an item from temporary location</td>
</tr>
<tr>
<td>STAFF_ELECTRONIC_DIGITIZATION</td>
<td>Staff electronic digitization request</td>
<td>Staff digitization request for electronic resource</td>
</tr>
<tr>
<td>STAFF_PHYSICAL_DIGITIZATION</td>
<td>Staff digitization request</td>
<td>Staff digitization request for physical resource</td>
</tr>
<tr>
<td>TRANSIT_FOR_RESELVING</td>
<td>Transit for reshelving</td>
<td>Transit physical item for reshelving</td>
</tr>
</tbody>
</table>

**Note**

- If the **Recalls Loans** value is set as **No** in this table for the **PATRON_PHYSICAL** type of request and the applicable loan Terms of Use has **Is Recallable** defined as **Yes**, the loan will not be recalled. Only if **Recalls Loans = Yes** is the Terms of Use policy applied.
- If **PATRON_PHYSICAL = Yes** and the Terms of Use fulfillment policy is **No Recall**, items are nevertheless marked as **Recalled**, to prevent renewals (although the loan due date is not changed).
- The block preference **Not Renewable - Item has Requests** is relevant only if **PATRON_PHYSICAL = Yes** (see Configuring Block Preferences).
To configure loan recall requests:

1. On the Request Configuration Mapping Table page for loan recalls (Configuration Menu > Fulfillment > Physical Fulfillment > Loan Recalls Configuration), select Customize from the row actions list for the relevant action. Customize 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. Select Save. Loan recall requests are not sent during the specified action.

To re-enable loan recall requests for an action, select Restore.

After configuring a loan recall request for a specified action, ensure that the institution/library's Terms of Use has set the loan policy Is Recallable = True for requested items to be recalled (see Adding Fulfillment Policies).

Configuring Loan Status Names

To configure loan status names, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can configure the loan statuses that are displayed in Alma. To do this, open the Loan Status Name mapping table (Configuration Menu > Fulfillment > Physical Fulfillment > Loan Status Name). For more information about mapping tables, see Mapping Tables. You can edit the description. This is the description that displays throughout Alma on various loan displays.

![Loan Status Names Configuration Mapping Table Page](image)

Configuring Request Task Names

To configure request task names, you must have one of the following roles:
You can customize the names of request statuses in your Primo My Account using the Request Task Name Patron Display Code Table page (Configuration Menu > Fulfillment > Physical Fulfillment > Request Task Name).

![Request Task Name Patron Display Code Table Page](image)

**Note**

Request statuses can be configured at the institution level only. Select the required institution from the Configuring filter on the Fulfillment Configuration page.

**To customize request task names:**

1. On the Request Task Name Patron Display Code Table page (Configuration Menu > Fulfillment > 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. Select **Customize**.

**Configuring Request Pickup Rules**

To configure request pickup rules, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

A library can configure rules that determine how different aspects of request workflows are managed. Using these rules, libraries can better control how and when requests expire, how they appear on the pickup shelf, and whether the item is to be considered missing if it was not fulfilled within a specified number of days.
Learn about configuring support for pickup requests in the Enhanced Request Configuration Options and Support for Self-Pickup Request video (3:50 mins).

To configure request pickup configuration:

1. On the Request Pickup Configuration page (Configuration Menu > Fulfillment > Physical Fulfillment > Request Pickup Configuration), select Add Rule. The Request Pickup Configuration page appears.

2. In the Name field, enter a name for the request pickup configuration rule.

3. In the Input Parameters section, specify the components of the input parameters (Name, Operator, and Value). A set of input parameters may look like this: User Group = Graduate student.

The available Name input parameters are:

- Location
- Request Type
- User Group

4. In the Output Parameters section, specify the following parameters that are to apply to the indicated Location, Request Type, or User Group:

- Consider as missing when expired - Whether the requested item is considered missing if it is not fulfilled within a specified number of days.
- Show in 'Pick From Shelf' list - Whether the requested item appears on the Pick From Shelf list.
- Expiry time for 'Pick From Shelf' (in days) - The number of days after which the request is considered expired. For example, if you specify 5 in this field, once a requested item is not picked up within 5 days, the request is considered expired. If you do not specify the expiry time, the default is 7 days.
- Calculate expiry time in open days - allows the number of days before a request is expired to be calculated for open days only. For instance, if the rule is 7 days but that calculated date is a closed day and the check box is selected, the Pick From Shelf task will expire on the next open day. If the check box is deselected (which is the default), the Pick From Shelf task will expire on the closed day.

When the item's expiration time arrives, the Requests – Handle Expiration Step job cancels the requests (see
Viewing All Scheduled Jobs).

5. Select **Save**. The rule appears on the Request Pickup Configuration page.

6. If you 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, since Alma applies the first (and only the first) appropriate, enabled rule.

7. Rules may be enabled or disabled in the **Enabled** column.

8. Select **Calculate Existing Requests Retroactively**. Alma retroactively applies the rules to existing requests. Otherwise, rules are applied only to requests created after the rule was enabled.

If no rule is configured, the item is always considered as missing when expired.

---

**Configuring Self-Check Machine Messages**

To configure self-check messages, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Messages for check-in, check-out, and renewal on self-check machines may be modified on the Self Check Messages page. It is accessed at (Configuration Menu > Fulfillment > Physical Fulfillment > Self Check Machines).

![Self Check Messages](image)

**Self Check Messages**

**To configure self-check machine messages:**

1. On the Self-Check Messages page, select **Customize** from the row actions list of the message that you want to configure.

2. Enter the new message in the **Description** field. Repeat these two steps for all messages that you want to configure.

3. When you are done, select **Customize** to save your changes.
Configuring Request Type Priorities

To configure request priorities, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

The Request Priorities mapping table allows you to configure the priorities for each of the different library request types. It is accessed at Configuration Menu > Fulfillment > Physical Fulfillment > Request Priorities.

To configure request priorities:

1. On the Request Priorities page, select Customize from the row actions list of the message that you want to configure.
2. Select the new priority in the Priority field. Repeat these two steps for all messages that you want to configure.
3. When you are done, select Save to save your changes.

The available request types are:

<table>
<thead>
<tr>
<th>Request type</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Library physical digitization request</td>
<td>A digitization request placed from a reading list</td>
</tr>
<tr>
<td>Move permanently</td>
<td>Request for a physical item to be moved to a new location</td>
</tr>
<tr>
<td>Move temporarily</td>
<td>Request for a physical item to be temporarily moved to a new location</td>
</tr>
<tr>
<td>Ship digitally</td>
<td>An internal digitization request placed by resource sharing staff</td>
</tr>
<tr>
<td>Request type</td>
<td>Meaning</td>
</tr>
<tr>
<td>------------------------</td>
<td>--------------------------------------------------------------</td>
</tr>
<tr>
<td>Ship physically</td>
<td>An internal physical item request placed by resource sharing staff</td>
</tr>
<tr>
<td>Restore item</td>
<td>Restore an item from a temporary location</td>
</tr>
<tr>
<td>Staff digitization request</td>
<td>Staff digitization request</td>
</tr>
<tr>
<td>Work order</td>
<td>Work order request</td>
</tr>
</tbody>
</table>

### Configuring Scan In Messages

To configure scan in messages, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can configure how pop-up messages will display in the Scan In Interface. All messages can be configured to appear as a pop-up message, a feedback message, or to not appear at all. It is accessed at Configuration Menu > Fulfillment > Physical Fulfillment > Scan In Messages Configuration. In addition to the message Type and display type (Show message) of the message, which is the only configurable field on this page, the Cancel available at popup field is a display only field that defines the phase during which an action is performed during the scan-in process. Those types set to Yes are actions that are done before the scan-in operation is performed. The scan-in actions can still be canceled at the point that these types of messages are displayed. In these cases, the Cancel available at popup displays Yes. However, if you choose Feedback Message or None in the Show Message field, you will not have the opportunity to cancel the action. Messages (pop-up or feedback) which appear during the second phase are presented only after the scan-in operation is completed and do not offer a Cancel option. Those types of messages display No in the Cancel available at popup field.

---

**Note**

The fulfillment note is a popup that occurs before the action is performed, and selecting Cancel cancels the action and everything that comes later (see that it appears with Cancel available at popup=yes). The temporary location popup occurs later in the process, and cannot cancel the action (Cancel available at popup=no). It will therefore only appear if the process continues, and not if it is canceled.

All early messages that are generated before the Scan In action is performed (Cancel available at popup=yes) will be grouped together, and all messages generated later on in the process, when it can no longer be canceled (Cancel available at popup=no), will be grouped separately, showing only if the action takes place.

Due to the two phases, you can potentially receive two sets of messages. However, if you cancel an action (this can only be done during the first phase as the second phase does not have the option to cancel), no further messages appear. The system is designed to present as few pop-up messages as possible and will merge messages that belong to the same
phase into a single pop-up window. If two messages are triggered in the same phase, for instance, an acquisition note and a fulfillment note, but one is set to **Popup message** and one is set to **Feedback message**, both messages appear in the pop-up message instead of one in the pop-up message and one in the feedback message. If there is a pop-up message displayed for another message, a feedback message will be displayed as part of it, in order for it not to get obscured by the pop-up and missed by the operator.

To configure scan in messages:

1. On the Scan In Messages Configuration page, select **Customize** from the row actions list of the message that you want to configure.
2. Select the message type:
   - **Popup message** displays a pop-up window to display the messages.
   - **Feedback message** appears in the notification bar that slides off to the right side of the page (unless aggregated with a pop-up message) and does not require a confirmation action by the user.
   - **None** suppresses the message from displaying on the Scan In Interface page.
3. When you are done, select **Save** to save your changes.

**Message Example**

To illustrate the possible message combinations, please see the example below.

**Cancel available at popup = Yes** (messages displayed before action is executed):

- Fulfillment note - popup
• Internal note 1 - feedback

**Cancel available at popup = No** (messages displayed after action is executed):

• Item has requests - popup
• Lost - feedback

![Image of a pop-up message](image)

As seen above, item 3121 has:

• Fulfillment note
• Internal note 1
• Process type "Lost"
• Requests

When scanning the item, the following messages are displayed:

• A pop-up message is displayed before the scan action, with a cancel option. The window displays the fulfillment note, which is set to pop-up message, and the internal note, which is set to feedback message, but it appears in the pop-up message because the popup would obscure the feedback message.

![Image of a pop-up confirmation message](image)

• Only after the first pop-up message is confirmed (i.e. the scan-in action was not canceled), an informative pop-up message is displayed. Since one of the messages (item has request) is set to popup, all informative messages display in the pop-up message.
As seen above, item 3121_2 has:

- Internal note 1
- Process type "Lost"

When scanning the item, the following messages are displayed:

- A feedback message for the internal note, as there is not a pop-up message that obscures the feedback message.
- A feedback message for the lost process type, as there is not a pop-up message that obscures the feedback message.

Because there is not a cancel pop-up, all feedback messages appear at the same time:
Patron Configurations

Configuring Patron (User) Groups

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 (Configuration Menu > Fulfillment > Patron Configurations > Patron Groups).

For details, see Configuring User Groups.

Note

If your institution is using user groups as fulfillment parameter (e.g., in Fulfillment Unit Rules, Display Logic Rules, etc.), you will need to update the rules with the new user group in order for them to take effect for users in the group.

Configuring Patron Limits

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 using 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 Mapping Table page (Configuration Menu > Fulfillment > Patron Configurations > Patron Limits).

![Patron Limits Mapping Table](image)

**Patron Limits Mapping Table Page**

**Note**

Patron limits can be configured at the institution level only. Select the required institution from the Configuring filter on the Fulfillment Configuration page.

The following actions can be performed on this page:

- Add a set of patron limits (see Adding a Set of Patron Limits)
- Edit a set of patron limits (select Edit)
- Delete a set of patron limits (select 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 Patron Limits Mapping Table page (Configuration Menu > Fulfillment > Patron Configurations > Patron Limits), select Add Row and select the patron user group for which you want to create a new set of limits.
2. Enter the following information:

- **Max. cash** – Maximum amount of cash that can be owed by the patron before the patron’s account is blocked.

  **Note**

  **Max. cash** is a required field.

- **Max. overdues** – Maximum allowed overdue loans before the patron’s account is blocked. If you define max. overdue = 1, the patron account is blocked only after there is more than one overdue loan. Setting max. overdue to 0 will block a patron with one overdue loan.

- **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

If you leave one of the above boxes blank, no limit will be applied in this area.

3. Select Add Row. The new set of limits is displayed at the bottom of the list of defined patron limits.

4. Select Save to store the new set of patron limits.

Configuring Patron User Authentication

Note

For Primo VE environments, you will also need to configure user authentication for Primo VE sessions. For more information, see Configuring User Authentication for Primo VE.

To configure patron user authentication, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can configure the login options that appear in the Alma digital viewers from the User Authentication page (Configuration > Fulfillment > Patron Configurations).

Patron User Authentication

To configure patron user authentication:

1. Open the User Authentication page (Configuration > Fulfillment > Patron Configurations > Patron User Authentication).

2. From the Profiles tab, in the Authentication Profiles section, activate the profiles that you want to appear in the Alma digital viewers.
3. In the Login Page Help Links section, activate and edit the links that appear when the patron clicks the Need help for this page link (configurable) in the viewer login page.

4. To have the viewer sign out when Alma times out, select Single Sign Out Upon Timeout.

5. Select the Login Labels tab. The following appears:

![Login Labels](image)

Login Labels

Edit the labels that appear in the viewer login page.

6. Click Save.

---

**Configuring Loan Limit Rules**

To configure loan limit rules, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

To limit the number of items a patron can check out simultaneously, add a loan limit rule. The rule can be applied according to library, location, item policy, material type, and user group.

You configure loan limit rules from the Loan Limit Rule page (Configuration Menu > Fulfillment > Patron Configurations > Loan Limits).
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:


   **Note**

   If you want to create a copy of an existing loan limit rule, select Duplicate from the row actions. Once you have copied the loan limit rule, you can modify it as needed.
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. Select 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. You can also select Zero, or Unlimited Loans.

7. Select Save to store the new rule.

   **Note**

   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.

---

**Configuring User Block Descriptions and Definitions**

For details on assigning user blocks to a user, see Blocking and Unblocking Users. These tables are also used when configuring user blocks due to overdue loans (Configuring User Blocks Due to Overdue Loans).

To configure user block definitions, you must first configure user block descriptions (you must select a description when configuring a definition). User block descriptions also appear in the drop-down list when blocking a user (see Blocking and Unblocking Users).

To access the user block descriptions, access the page at Configuration Menu > Fulfillment > Patron Configurations > User Block Description
User Block Description

The following actions can be performed on this page:

- Import a list of user block descriptions from a file
- Add a new user block description
- Delete a user block description
- Enable/disable a user block description
- Reorder the list of user block descriptions
- Modify the code or description fields
- Select one description to be a default value in the list

You configure user block definitions on the User Block Definitions Mapping Table page (Configuration Menu > Fulfillment > Patron Configurations > User Block Definitions).

Mapping Table Page – User Block Definitions

Note

Patron-specific blocks can be configured at the institution level only. Select the required institution from the Configuring filter on the Fulfillment Configuration page.

The following actions can be performed on this page:
• Add a set of user block definitions (see Adding User Block Definitions)
• Edit a set of user block definitions (modify settings on the User Block Definitions Mapping Table page. You cannot change the ID that is defined for a user group definition).
• Delete a set of user block definitions (select Delete)

Adding User Block Definitions

The user block definitions that you define apply to all libraries within the institution.

To add a new user block definition:

1. On the User Block Definitions Mapping Table page, select Add Row and enter the ID for the new user block definition in the Id field.

2. Select the following information from the respective drop-down lists:
   ◦ Description – Describes the block action; the reason for the block. This list includes all of your user block descriptions. See the User Block Descriptions code table for defining descriptions, above.
   ◦ Blocked action – Select the blocked action from one of the following:
Note

These blocked actions are preconfigured in Alma. To configure additional blocked actions, including a block for resource sharing requests, contact Ex Libris Support.

- 01 – loan
- 02 – loan, renew
- 03 – loan, renew, hold

**Type** – Select the type of block from one of the following:

- Cash
- Consortial block
- Demerit
- General
- Loan
- Resource sharing requests
- User

**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)

**Network Block** - Select whether the block will be copied when creating or refreshing a linked account.

- TRUE - Copy the block
- FALSE - Do not copy the block. This is the default.

Select **Add Row**. The new user block definition is displayed at the bottom of the list of defined user block definitions.

Select **Save** to store the new set of user block definition.

### Configuring Demerits

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 Blocks** job runs daily to remove blocks from user records.

---

**Note**

In addition, for detailed examples of demerit configuration, see [How to Configure Demerits](#).

---

### Enabling the Demerit System

Configure the following parameters (see [Configuring Other Settings](#)):

- **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.

Demerit points always have an active status. However, if the the time defined in **demerits_history_days** has passed since the points were created, the points will be ignored when calculating the sum of demerits, even though the points have an active status.

---

### Configuring Demerit Points

The Demerits Points 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 Demerits Points mapping table page ([Configuration Menu > Fulfillment > Patron Configuration > User Demerits](#)), in Add Row, 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.

2. Select Add Row.

Alma uses the following priority to decide which mapping row to use when assigning demerit points to a user:

1. Both the user's group and the material being returned match the values in the table.
2. The user's group matches the value in the table and the Material Type is set to All in the table.
3. The returned item matches the Material Type value in the table and User Group is set to All in the table.
4. Both User Group and Material Type are set to ALL in the table.
5. 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:

**Example Demerit Point Mapping Rows**

<table>
<thead>
<tr>
<th>User Group</th>
<th>Material Type</th>
<th>Regular Overdue Points</th>
<th>Recalled Overdue Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergrad</td>
<td>Book</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>All</td>
<td>Manuscript</td>
<td>3</td>
<td>6</td>
</tr>
</tbody>
</table>
3. After you have added all of your demerit point definitions, select **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 User Block Definitions 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 Descriptions and Definitions](#).

---

**Monitoring the Blocks Job**

The [Users - Remove 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. If this is the case, the user’s block is lifted.

For more information, see [Viewing Job Reports](#).

---

**Configuring Consortial Blocks**

To configure consortial blocks, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can configure a block that can be copied between members of a fulfillment network. A **consortial block**, which is copied only from the source institution to the target institution, refers to the incoming block at the target institution. The block is copied when the linked account is initially created or when the target record is refreshed. The copied block appears as a consortial block rather than the original block type from the source, though a block note indicates the original block type as it appeared in the source institution.

To activate consortial blocks on the **source** side:

- Set up any blocks that will be sent to the target in the User Block Definition table with the **Network Block** field set to **True**. See [Configuring User Block Descriptions and Definitions](#).

To activate consortial blocks on the **target** side:

- Set up Linked Account rules with the **Copy Networks Block** field set to **Yes**. See [Configuring Linked Account Rules](#).
- In the User Block Description table, create a record if one does not already exist with code CONSORTIA. Enter CONSORTIA in the **Code** field and Consortial block in the **Description** field.
- In the User Block Definitions table, create a record with **Type** and **Description** fields set to Consortial block. To ensure that this block is not copied back to the source, set the **Network Block** field to **False**. See [Configuring User Block Descriptions and Definitions](#).
Configuring User Blocks Due to Overdue Loans

You can implement a blocking policy so that a loan that is returned overdue will trigger a block on the user record after the patron returns an overdue loan, according to the defined Block When Overdue policy. The block policy may be set separately for each Terms of Use. By default, the policy blocks holds, resource sharing requests, loans, and renewals. As noted in the configuration procedure below, the User Block Definitions mapping table and User Block Descriptions code table (see Configuring User Block Descriptions and Definitions) must be configured in order to create overdue blocks. The maximum_overdue_block_per_block parameter should also be configured to define whether the policy is applied to each block individually or to all the blocks in total. See Configuring Other Settings (Fulfillment).

The block may be selected for a period of time depending on the time the loan is overdue (based on only open days or all days), or may be for a fixed time. The block is automatically lifted once the configured expiry date passes, as part of the Users - Remove Blocks job.

To configure a blocking policy

1. Access the User Block Description table (Configuration Menu > Fulfillment > Patron Configurations > User Block Description). Add a new row with code OVERDUE (see Configuring User Block Descriptions and Definitions).
2. Access the User Block Definitions table (Configuration Menu > Fulfillment > Patron Configurations > User Block Definitions). Add a new row of type Loan using the overdue loan block that was created in the prior step.
3. Access the Fulfillment Terms of Use (Configuration Menu > Fulfillment > Physical Fulfillment > Terms of Use and Policies). Add a new loan Terms of Use or edit an existing one (see Configuring Terms of Use).
   
   The Block When Overdue Terms of Use does not block by default.
4. To create the block, select the blank line from the drop-down, and select Add Policy from the Actions menu.
5. On the Policy Details page, select **Value type** of **Other**. Enter a number in the **Value** field. Then select from the **Unit of Measurement** drop-down list. Overdue blocks may be calculated based on number of overdue days accumulated across multiple loans (cumulative) or based on the overdue days of a single loan (discrete). If an applicable **Block When Overdue** policy has a cumulative unit of measurement, the expiry date is calculated as the latest block expire date plus the number of days as defined by the policy. If a cumulative value is not chosen, the expiry date will be according to the policy only, without considering existing blocks. Overdue blocks are calculated based on full 24 hour days. If the unit of measurement is for days, the block is applied for a full day (24 hours between return date and due date).

**Note**

If **Days per Overdue Days - Discrete** or **Open Days per Overdue Days - Discrete** is selected as a unit of measurement, the calculation is \(<\text{Overdue/Open overdue days}> \times <\text{Value}>\).

Available values for **Block When Overdue** are:

- All Days - Cumulative
- All Days - Discrete
- Days per Overdue Days - Cumulative
- Days per Overdue Days - Discrete
- Months - Cumulative
- Months - Discrete
- Open Days - Cumulative
- Open Days - Discrete
- Open Days per Open Overdue Days - Cumulative
- Open Days per Open Overdue Days - Discrete
- Weeks - Cumulative
- Weeks – Discrete
- None

6. Select Save.

7. On the Terms of Use Details page, select **Maximum Period for Overdue Block**. The maximum overdue block period policy affects the calculation of the overdue loan block's expiry date. If a block's expiry date is calculated to be later than the maximum, the block will be shortened to match the limit. The default policy does not set a maximum overdue block period.

8. To create the maximum block policy, select the blank line from the drop-down, and select **Add Policy** from the **Actions** menu.

**To view user blocks:**

Search for a user in Manage Users. Select the **Blocks** tab to see all active blocks on this user (including the block's expiry date).

![View User Blocks](image)

The block also displays when trying to perform certain actions, such as loaning an item.

![User block pop-up](image)

**To view removed user blocks:**

User blocks that have passed their expiry date are automatically removed when the **Users - Remove blocks** job runs.

1. Access **Monitor Jobs**. Find the **Users - Remove Blocks** job.

2. Within the report, select the link **Delete user overdue loan block**. For more information about patron blocking due to overdue loans, see the **Patron blocking due to overdue loans** video (11:22 mins).
**Note**

Overdue blocks for active loans (i.e., those that were created by the overdue and lost loan profiles job) will be removed during loan renewal.
Configuring Digital Fulfillment

For additional configuration tasks related to digital fulfillment, see:

- Configuring Digitization and Copyright Rules
- Configuring Access Rights Policies for Digital Objects
- Configuring Digital Resource Copyright Declarations
- Configuring Copyright Publishers

Configuring Digitization Departments

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. If necessary, the existing department may be modified or additional departments created. You can configure digitization departments on both the institution and library levels. Unless a specific library-level digitization department is defined, the institution-level digitization department applies to the library level as well.

You configure digitization departments on the Department List page, (Configuration Menu > Fulfillment > Digital Fulfillment > Digitization Departments).

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 Configuring filter on the Fulfillment Configuration page.

Select the digitization departments code, name, description, or owner headings to sort the list alphabetically, in ascending or descending order.

The following actions can be performed on this page:

- Add a digitization department (see Adding a Digitization Department)
- Edit a digitization department (select Edit from the row actions list)
• Delete a digitization department (select Delete from the row actions list)

Adding a Digitization Department

If you add a digitization department to the institution, it is available for all the libraries within the institution as well.

The procedure for adding a digitization department is identical to the procedure for adding a processing department (see Configuring Processing Departments).

To add a digitization department:

1. On the Department List page (Configuration Menu > Fulfillment > Digital Fulfillment > Digitization Departments), select Add Department. The General Information page appears. This is the first page of a four-page wizard.
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>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>A textual description of the digitization department.</td>
</tr>
<tr>
<td>Work time</td>
<td>The number of days after which an item is considered expired.</td>
</tr>
<tr>
<td>(days)</td>
<td></td>
</tr>
<tr>
<td>Map</td>
<td>The URL of a map to assist patrons in finding the department.</td>
</tr>
<tr>
<td>Printer</td>
<td>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.</td>
</tr>
</tbody>
</table>

5. Select Next. The Contact Information page appears.
6. Select Next. The Operators page appears.

7. To add an operator, select Add Operator. The Add Operator dialog box appears.

Select the select from list icon to search for and add operators, and select Add to add more operators, or Add and Close if you do not want to add more operators.

8. Select Save. The digitization department is added to the Department List.
Configuring Electronic Document Delivery Rules

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.


Electronic document delivery rules can be configured at the institution level only. Select the institution from the Configuring filter on the Fulfillment Configuration page.

The following actions can be performed on this page:

- Add electronic document delivery rules (see Adding Electronic Document Delivery Rules)
- Edit electronic document delivery rules (select Edit from the row actions list)
- Duplicate electronic document delivery rules (select Duplicate from the row actions list and modify the relevant fields)
- Delete electronic document delivery rules (select Delete from the row actions list)
- Enable/Disable electronic document delivery rules

Adding Electronic Document Delivery Rules

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:

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. Select **Add Parameter**. 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. Select **Save** to store the new rule.

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.

---

**Configuring Delivery Profiles Metadata**

To configure delivery profiles metadata, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can configure what metadata fields are displayed when viewing digital content in the Alma viewers and the order in which they appear.

**To configure the Alma Viewer metadata elements:**

1. Select **Delivery Profiles Metadata** (**Configuration > Fulfillment > Digital Fulfillment**). The following appears:
2. Select the metadata type that you want to configure. (The following appears for Qualified Dublin Core. If you select MARC, MARC fields appear): The metadata type appears as a code table. For more information about code tables, see Code Tables.


4. Reorder the fields using the arrow buttons to change the order in which the fields appear in the Alma Viewer.

5. Select Customize.

The fields appear in the viewer according to your configuration.

For information on the mapping of these fields to MARC fields, see Bibliographic Details. Note that the Description field (which is not in Analytics) is mapped to MARC fields 505 and 520.
Configuring Alma Viewer Labels

To configure Alma Viewer labels, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can configure the Alma Viewer labels for each language that is configured. For information about the viewer, see The Alma Viewer. You manage these labels on the Alma Viewer Labels code table (Configuration > Fulfillment > Digital Fulfillment > Alma Viewer Labels). For more information about code tables, see Code Tables.

![Alma Viewer Labels Code Table](image)

Alma Viewer Labels Code Table

You can edit and restore the default label and translations for each label in your configured languages.

Configuring Viewer Share Buttons

To configure viewer share buttons, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can configure the social network sharing buttons that appear when selecting the Share link in the Alma Viewer, Universal Viewer, and Internet Archive Book Reader Viewer. You manage these social network sharing buttons on the Viewer Share Buttons code table (Configuration > Fulfillment > Digital Fulfillment > Viewer Share Buttons). For more information about code tables, see Code Tables.

![Viewer Share Buttons Code Table](image)
Courses

For additional configuration tasks related to course reserves, see:

- Configuring Digitization and Copyright Rules
- Configuring the Citation Default Copyright Status
- Translating Notifications

Configuring Processing Departments

To configure processing departments, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Processing departments are the internal/staff units that are responsible for managing course reading lists and citations. This field is mandatory when creating a course (see Adding a Course), but it is (currently) for informational purposes only.

Each Alma institution or library can include many processing departments. Each processing department that you define at the institution level is available to the libraries within the institution.

You configure processing departments from the Department List page (Configuration Menu > Fulfillment > Courses > Processing Departments).

![Department List Page](image)

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.

Configuring Academic Departments

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 (see Adding a Course). 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 Course Faculties code table (Configuration Menu > Fulfillment > Courses > Academic Departments). For more information about code tables, see Code Tables.

Most of the details are system-generated and cannot be edited.

You can add, enable or disable departments, or select one as the default selected department in the drop-down list.

You can import academic departments information using the Import tab in the Course Faculties code table, as follows:

To import academic departments information:

1. Export the file using Export > Excel (see Export to Excel).
2. Make your changes and save the file. Note that there should be no duplicate lines in the Excel file.
3. Select Import on the relevant page.
4. In the File field, select Browse to locate the file on your computer.
5. Select the file you wish to upload, then select Open.
6. When the document is loaded, select Upload File.

Configuring Additional Reading List Citation Statuses

To configure reading list citation statuses, you must have one of the following roles:

• General System Administrator
• Fulfillment Administrator

While managing reading list citations, you can assign a status to the citation (see Managing Citations). Alma comes with a number of predefined citation statuses (see Reading List and Citation Statuses in the Leganto Administration Guide). You can configure additional citation statuses. Note that you cannot remove Alma’s predefined statuses.

You define additional citation statuses on the Additional Reading List Citation Statuses code table (Configuration Menu >
Fulfillment > Courses > Additional Reading List Citation Statuses). For more information about code tables, see Code Tables.

See also Configuring Reading List Statuses.

Additional Reading List Citation Statuses Page

You can add, edit, and delete additional citation statuses on this page. You cannot edit or delete any system-defined statuses (which do not appear on this table). You can select a status as the default selected status in the drop-down list.

Configuring Automatic Purchasing Requests from Citations

You can configure rules to automatically create purchase requests for citations based on criteria associated with the citation, reading list, and/or course. These rules are run whenever a citation is saved (note that citation status is one of the criteria that can be checked). For more information on purchase requests, see Purchase Requests.

The rules are created on the Purchase Workflow Rules List page (Configuration Menu > Fulfillment > Courses > Citation Processing Rules). For more information about rules tables, see Rules Tables.

Purchase Workflow Rules List Page

Rules are checked from top to bottom and only the first matching rule applies. If no rules match, a purchase request is not created. You can enable and disable rules, change their order, edit, duplicate, or delete them. For more information about working with rules, in general, see Configuring Digitization and Copyright Rules.

The new purchase request is "created by" the user that added or edited the citation.

A purchase request is not created if:

- A purchase request already exists for the citation's resource
- The reading list is not associated with a course
- No rules match the criteria

To create an automatic citation processing rule:

2. Enter a name (mandatory) and description for the rule.

3. Enter criteria for the rule and select Add Parameter (repeat as required; all criteria must match for the rule to trigger). Criteria are composed of the following elements:
   ◦ **Name** - Select one of:
     - Academic Department - Whether the course has one or none of the selected academic departments
     - Available in Electronic - Whether the citation's resource is already available electronically
     - Citation Status - Whether the citation's status matches one or none of the selected statuses

   ◦ **Operator** - Select the relevant comparison operator, depending on the criteria selected for **Name**.

   ◦ **Value** - Select one or more values, or enter a value, for the criteria, depending on the criteria selected for **Name**.

4. After entering one or more criteria, select in Request Format whether the requested purchase should be physical or electronic.

5. When you are done, select Save.

---

**Configuring Course Terms**

To configure additional reading list statuses, you must have one of the following roles:
Course terms appear in the Terms list field when adding a new course on the Manage Course Information page. For more information, see Managing Courses.

You manage course terms on the Course Terms code table page (Configuration Menu > Fulfillment > Courses > Course Terms). It is not possible to add or delete course terms; however, you can customize the course term descriptions and enable/disable the terms. For more information about code tables, see Code Tables.

Configuring Citation Attribute Types

To configure citation attribute types, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

When working with citations, you can add attributes to the citations (see Attaching Citation Attributes to Citations). Each attribute has a name and a type.

You can configure additional attribute types that you will then be able to map to attributes on the Citation Attributes Types Code Table page (Configuration Menu > Fulfillment > Courses > Citation Attributes Types). For more information about code tables, see Code Tables.
Alma comes configured out-of-the-box with the citation attribute type **Requested_format**. Up to five citation attributes can be added per citation attribute type.

(See also Configuring Citation Attributes and Mapping Citation Attributes to Citation Attributes Types.)

### Configuring Citation Attributes

To configure citation attributes, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

When working with citations, you can add attributes to the citations (see Attaching Citation Attributes to Citations). Each attribute has a name and a type.

You can configure additional attributes for citations on the Citation Attributes Code Table page (Configuration Menu > Fulfillment > Courses > Citation Attributes). For more information about code tables, see Code Tables. Alma comes configured out-of-the-box with the citation attributes Book, Audio, CD, and DVD.

![Citation Attributes Code Table](image)

**Citations Attributes Page**

---

**Note**

The **Default value** field is not relevant in this table.

---

Up to five citation attributes can be added per citation attribute type.

(See also Configuring Citation Attribute Types and Mapping Citation Attributes to Citation Attributes Types.)

### Mapping Citation Attributes to Citation Attributes Types

To configure citation attributes to citation attributes types, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator
When working with citations, you can add attributes to the citations (see Attaching Citation Attributes to Citations). Each attribute has a name and a type.

Before you use citation attributes, you must map citation attributes to citation attribute types on the Citations Attributes To Citations Attributes Types mapping table (Configuration Menu > Fulfillment > Courses > Citation Attributes to Citation Attributes Types). For more information about working with mapping tables, see Mapping Tables.

Alma comes configured out-of-the-box with the Book, Audio, CD, and DVD attributes mapped to the Requested_format attribute type.

You can add additional attribute types and attributes, and map them to each other, as needed. Up to five citation attributes can be added per citation attribute type.

(See also Configuring Citation Attribute Types and Configuring Citation Attributes.)

To map citation attribute types to citation attributes:

1. On the Citations Attributes To Citations Attributes Types mapping table page, select Add Row.
2. In the Attribute field, select a citation attribute.
3. In the Attribute type field, select a citation attribute type to which you want to assign to the selected attribute.
4. Select Add Row. The mapped values appear in the Mapping Table Rows table. The attribute is mapped to the indicated attribute type.
5. When you are done, select Customize.

Configuring Citation Matching Criteria

You can configure the fields that Alma uses to match newly-entered non-repository citations to Alma inventory. For books (with ISBNs), Alma tries to match to the MMS record. For articles (with ISSNs), Alma tries to match using the OpenURL link resolver. Alma tries to match all enabled fields (AND). See Managing a Citation’s Attachment to an Inventory Item.

You configure the fields on the Match by Fields code table (Configuration Menu > Fulfillment > Courses > Locate Citation by Fields). For more information about code tables, see Code Tables.
To add or remove fields as required matching criteria:

Select the gray or yellow checkmarks in the rows. Select Customize when you are done. The display order and default value features on this page are not enabled.

**Originating system ID** is the ID that the record had in the previous system before the record was migrated to Alma. The field appears if it was added during the migration process (for more information, contact Ex Libris customer support) and can be added manually when editing a citation (see Adding Citations to a Reading List).

---

**Configuring Citation and Section Tags**

**Note**

Sections (and section tags) are only relevant for Leganto.

In addition to attributes, citations and reading list sections can use an expanded tagging system.

- Librarians can configure any amount of tags for both citations and sections in Alma.
- **Public** citation and section tags appear to patrons in Leganto. **Instructor-Library** tags can be seen only by instructors and librarians in Leganto and Alma. **Library-Internal** tags can be seen only by librarians.

**Note**

A fourth type of tag, **Internal**, is created by Ex Libris and cannot be managed by customers. These tags are typically added to a section or citation as a result of a Leganto or Alma feature and used to indicate some kind of process status for that feature. They are visible to instructors in Leganto and to librarians in Leganto and Alma. Customers cannot add, edit, manage, or remove these tags.

- Librarians can view and remove citation tags to/from citations in Alma. The tags assigned to citations appear in each citation section on the Edit Reading List page (see Managing Citations).
- Tag descriptions must be at least three characters long.
- Defining tags is a two-step process:
  1. Define the tag in the Tags table.
  2. Configure the tags as citation/section and as public/instructor-library/library-internal on the Tag Mapping table.
To define tags:

1. To define public tags, open the Tags code table (Configuration Menu > Fulfillment > Courses > Tags). For more information about code tables, see Code Tables.

   ![Public Tags Page](image1)

   Make any required changes. Note that the Default Value field currently has no effect. When you are done, select Customize to save your changes.

2. Open the Tags to Tag Mapping table (Configuration Menu > Fulfillment > Courses > Tag Mapping). For more information about working with mapping tables, see Mapping Tables.

   ![Tags to Tags Level and Visibility Page](image2)

   Make any required changes. When you are done, select Save to save your changes.

---

**Note**

- Changing this table does not affect any existing tags already attached to citations.
- (Leganto only) The order that tags appear in the drop-down list in Leganto is determined by the Leganto customer parameter `tag_sorting` (Configuration Menu > Leganto > General > Settings). The options are:
  - **group** (default) – Sort in the following orders: all public tags, followed by (librarians only) all library-internal tags, followed by all library-instructor tags. Within each group, the order is determined by the order in the Tags code table.
  - **table** – Sort only by the order in the Tags code table.
Configuring Reading List Subjects

You can view the out-of-the-box subjects available for reading lists on the Reading List Subject Tags code table (Configuration Menu > Fulfillment > Courses > List Subjects). You can add new subjects on the Additional Reading List Subject Tags code table (Configuration Menu > Fulfillment > Courses > Additional List Subjects). For more information about code tables, see Code Tables.

On the Reading List Subject Tags code table, you can enable, disable, or change the names of the subjects. The available subjects are as follows:

<table>
<thead>
<tr>
<th>Aeronautics</th>
<th>Aesthetics</th>
<th>Agriculture</th>
<th>Anarchism</th>
<th>Angling</th>
</tr>
</thead>
<tbody>
<tr>
<td>Animal Husbandry</td>
<td>Animal Science</td>
<td>Anthropology</td>
<td>Aquaculture</td>
<td>Arboriculture</td>
</tr>
<tr>
<td>Archaeology</td>
<td>Architecture</td>
<td>Archives</td>
<td>Art</td>
<td>Astronautics</td>
</tr>
<tr>
<td>Astronomy</td>
<td>Atlas</td>
<td>Bahaiism</td>
<td>Bible</td>
<td>Bibliography</td>
</tr>
<tr>
<td>Biography</td>
<td>Biology</td>
<td>Books</td>
<td>Botanic</td>
<td>Botany</td>
</tr>
<tr>
<td>Bridges</td>
<td>Buddhism</td>
<td>Building Construction</td>
<td>Canon Law</td>
<td>Cartography</td>
</tr>
<tr>
<td>Chemical Technology</td>
<td>Chemistry</td>
<td>Christianity</td>
<td>Civil Engineering</td>
<td>Classical Studies</td>
</tr>
<tr>
<td>Colonization</td>
<td>Commerce</td>
<td>Communication</td>
<td>Communism</td>
<td>Community</td>
</tr>
<tr>
<td>Criminology</td>
<td>Decorative Art</td>
<td>Demography</td>
<td>Dentistry</td>
<td>Dermatology</td>
</tr>
<tr>
<td>Design</td>
<td>Diplomatics</td>
<td>Doctrinal Theology</td>
<td>Drawing</td>
<td>Eclectic Medicine</td>
</tr>
<tr>
<td>Economic History</td>
<td>Economic Theory</td>
<td>Education</td>
<td>Education Theory</td>
<td>Electrical Engineering</td>
</tr>
<tr>
<td>Electronics</td>
<td>Emigration</td>
<td>Engineering</td>
<td>Environmental Science</td>
<td>Environmental Technology</td>
</tr>
<tr>
<td>Epigraphy</td>
<td>Ethics</td>
<td>Family</td>
<td>Finance</td>
<td>Fisheries</td>
</tr>
<tr>
<td>Folklore</td>
<td>Forestry</td>
<td>Genealogy</td>
<td>Geography</td>
<td>Geology</td>
</tr>
<tr>
<td>Gynecology and Obstetrics</td>
<td>Heraldry</td>
<td>Highway Engineering</td>
<td>History</td>
<td>History of Civilization</td>
</tr>
<tr>
<td>--------------------------</td>
<td>---------</td>
<td>---------------------</td>
<td>---------</td>
<td>------------------------</td>
</tr>
<tr>
<td>History of Education</td>
<td>Homeopathy</td>
<td>Horticulture</td>
<td>Human Anatomy</td>
<td>Human Ecology</td>
</tr>
<tr>
<td>Hunting</td>
<td>Hydraulic Engineering</td>
<td>Illustration</td>
<td>Industry</td>
<td>Information Resources</td>
</tr>
<tr>
<td>Inscriptions</td>
<td>International Law</td>
<td>International Migration</td>
<td>International Relations</td>
<td>Islam</td>
</tr>
<tr>
<td>Judaism</td>
<td>Labor</td>
<td>Law</td>
<td>Leisure</td>
<td>Libraries</td>
</tr>
<tr>
<td>Linguistic</td>
<td>Literature</td>
<td>Literature on Music</td>
<td>Local Government</td>
<td>Logic</td>
</tr>
<tr>
<td>Manners and Customs</td>
<td>Map</td>
<td>Marriage</td>
<td>Mathematical Geography</td>
<td>Mathematics</td>
</tr>
<tr>
<td>Medicine</td>
<td>Metallurgy</td>
<td>Microbiology</td>
<td>Mining Engineering</td>
<td>Modern Languages</td>
</tr>
<tr>
<td>Motor Vehicles</td>
<td>Municipal Government</td>
<td>Music</td>
<td>Mythology</td>
<td>Natural History</td>
</tr>
<tr>
<td>Nuclear Engineering</td>
<td>Numismatics</td>
<td>Nursing</td>
<td>Ocean Engineering</td>
<td>Oceanography</td>
</tr>
<tr>
<td>Ophthalmology</td>
<td>Otorhinolaryngology</td>
<td>Painting</td>
<td>Paleography</td>
<td>Pathology</td>
</tr>
<tr>
<td>Pediatrics</td>
<td>Pharmacology</td>
<td>Philology</td>
<td>Philosophy</td>
<td>Physical Geography</td>
</tr>
<tr>
<td>Physics</td>
<td>Physiology</td>
<td>Plant Breeding</td>
<td>Plant Propagation</td>
<td>Political Science</td>
</tr>
<tr>
<td>Political Theory</td>
<td>Practical Theology</td>
<td>Print Media</td>
<td>Psychology</td>
<td>Public Welfare</td>
</tr>
<tr>
<td>Race</td>
<td>Rationalism</td>
<td>Recreation</td>
<td>Religions</td>
<td>Religious Law</td>
</tr>
<tr>
<td>Sanitary Engineering</td>
<td>Science</td>
<td>Sculpture</td>
<td>Seals</td>
<td>Silviculture</td>
</tr>
<tr>
<td>Social Class</td>
<td>Social History</td>
<td>Socialism</td>
<td>Social Pathology</td>
<td>Social Problem</td>
</tr>
<tr>
<td>Social Reform</td>
<td>Social Science</td>
<td>Society</td>
<td>Sociology</td>
<td>Statistics</td>
</tr>
<tr>
<td>Surgery</td>
<td>Technical Chronology</td>
<td>Technology</td>
<td>Theosophy</td>
<td>Therapeutics</td>
</tr>
<tr>
<td>Transportation</td>
<td>Visual Art</td>
<td>Women and Sexuality</td>
<td>Writing</td>
<td>Zoology</td>
</tr>
</tbody>
</table>

On the Additional Reading List Subject Tags code table, you can add, delete, enable, disable, or change the names of new subjects.

**Note**

- Alma does not check if the codes you enter on the Additional Reading List Subject Tags code table are unique, both within the table and with the codes in the Reading List Subject Tags code table. If you enter a duplicate code, the results may be unexpected.
- If you remove a subject from the Additional Reading List Subject Tags code table that was assigned to a reading list, the subject remains assigned to the reading list until you remove it from the reading list.

**Configuring Citation Material Types**

You can view the secondary material types available for citations on the Reading List Citation Secondary Types code table.
You can change the display names of the types, and you can disable and enable types from appearing in dropdown lists in Alma.

The types are:

<table>
<thead>
<tr>
<th>Abstract</th>
<th>Anthology</th>
<th>Archive</th>
<th>Article</th>
<th>Artwork</th>
<th>Audio Recording</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blog</td>
<td>Book</td>
<td>Book Chapter</td>
<td>Book Extract</td>
<td>Case</td>
<td>Case Study</td>
</tr>
<tr>
<td>CD</td>
<td>Computer Program</td>
<td>Conference</td>
<td>Conference Paper</td>
<td>Database</td>
<td>Dissertation</td>
</tr>
<tr>
<td>Grant</td>
<td>Image</td>
<td>Interview</td>
<td>Journal</td>
<td>Legal Document</td>
<td>Legislation</td>
</tr>
<tr>
<td>Letter</td>
<td>LibGuides</td>
<td>Manuscripts</td>
<td>Map</td>
<td>Music</td>
<td>Newspaper</td>
</tr>
<tr>
<td>Newspaper Article</td>
<td>Note *</td>
<td>Other</td>
<td>Pamphlet</td>
<td>Patent</td>
<td>Poem</td>
</tr>
<tr>
<td>Presentation</td>
<td>Reference Entry</td>
<td>Research Dataset</td>
<td>Review</td>
<td>Score</td>
<td>Series</td>
</tr>
<tr>
<td>Video</td>
<td>Website</td>
<td>Working Paper</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Citations of type Note (citations whose material type is set to Note) are added by instructors in Leganto. They are used to provide information to the students who are viewing the reading list, and do not need to be fulfilled by the library staff. You can only edit or delete them in Alma.
Configuring Reading List Statuses

To configure reading list statuses, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

While managing a reading list, you can assign a status to the reading list (see Managing Reading Lists). Alma comes with a number of predefined reading list statuses (see Reading List and Citation Statuses in the Leganto Administration Guide). You can change the name of the predefined statuses and you can add additional reading list statuses. Note that you cannot remove Alma’s predefined statuses.

You configure reading list statuses on the Reading List Statuses code table (Configuration Menu > Fulfillment > Courses > Reading List Statuses). For more information about code tables, see Code Tables.

Reading List Statuses Page

You can change the names of the reading list statuses on this page. You cannot edit or delete any system-defined statuses.

You add additional reading list statuses on the Additional Reading List Statuses code table (Configuration Menu > Fulfillment > Courses > Additional Reading List Statuses).

See also Configuring Additional Reading List Citation Statuses.

Additional Reading List Statuses Page

You can add, edit, and delete additional reading list statuses on this page. The default radio button has no effect on this page.

**Note**

- Alma does not check if the codes you enter on the Additional Reading List Statuses code table are unique, both within the table and with the codes in the Reading List Statuses code table. If you enter a duplicate code, the results may be unexpected.
- If you remove a subject from the Additional Reading List Statuses code table that was assigned to a reading list,
Mapping Bibliographic Record Fields to Citation Fields

The fields in a citation are copied from bibliographic records when a) you create a citation from a repository record or b) a resource locate is successfully performed (manually or automatically) on the citation, thereby connecting the citation to a repository record.

Note

Also see the parameters reading_list_auto_locate_citation_upon_creation, resource_locate_multiple_matches, and resource_locate_multiple_matches_priority in Configuring Other Settings. If you are using Leganto, you can configure whether the values in the bibliographic record overlays or merges with the values already in the citation; see Configuring Repository Locate Workflow.

Mapping fields is done using normalization rules, which contain a condition and one or more actions to be applied to records. The syntax for these rules is described in Normalization Rule Syntax. For a quick view of the default mapping, see Repository Fields Used to Overwrite Citation Fields.

In the Bibliographic Mapping Rules page (Configuration Menu > Fulfillment > Courses > Bibliographic Mapping Rules), you can select to edit a set of test rules that you can then test on the Test BIB to Citation Normalization page (Configuration Menu > Fulfillment > Courses > Test BIB to Citation Normalization). When you are happy with the results, copy your changes to the production rules on the Bibliographic Mapping Rules page (and optionally test them again on the Test BIB to Citation Normalization page).

To configure the mapping that determines how the data in a bibliographic record is copied to the citation:

1. In the Bibliographic Mapping Rules page, select Customize in the row actions list for the test rules (Test - dslr to convert marc to course reserve citation). An edit page appears.
2. Add, edit, or delete rules in the content as required. For assistance, seeNormalization Rule Syntax. When you are done, select Customize.

3. On the Test BIB to Citation Normalization page:
   1. Enter the MMS ID of a record to test.
   2. Select the test normalization rule Test - dslr to convert marc to course reserve citation.

4. If everything appears correctly, return to the Bibliographic Mapping Rules page, copy the changes from the test rules to the production rules (Prod - dslr to convert marc to course reserve citation), and save the changes.

5. Optionally ensure that the rules work correctly by testing the production rules on the Test BIB to Citation Normalization page.
Configuring Resource Sharing

For additional configuration tasks related to resource sharing, see:

- To set up a resource sharing library, see Configuring Parameters of a Resource Sharing Library.
- Configuring a Resource Sharing Copyright Declaration
- Configuring Resource Sharing Copyright Statues

Configuring Temporary Item Creation Rules

To configure temporary item creation rules, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

A temporary item creation rule applies to a resource sharing library. A 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 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 Editing a Fulfillment Unit.

You configure temporary item creation rules on the Temporary Item Creation Rule page (Configuration Menu > Fulfillment > Library Management > Temporary Item Creation Rules). For more information about rules tables, see Rules Tables.

**Temporary Item Creation Rule Page**

The Temporary Item Creation Rules option appears only when you are in the context of a Resource Sharing Library; select Resource Sharing Library from the Configuring filter on the Fulfillment Configuration page.

The temporary item creation rules list displays rules only for the library that is currently being configured.

Temporary item creation rules are configured similarly to regular fulfillment rules (see Editing a Fulfillment Unit), with the
following differences:

- For **Input Parameters**, 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

- For **Output Parameters**, specify the Location to which to move the items, and the Item Policy to invoke. When working with an NCIP partner, the value in the Location field is used as the default location for the temporary item that is created when receiving a borrowing request.

---

### Configuring Workflow Profiles

To configure workflow profiles, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Workflows, defined by workflow profiles, control the actions that can be performed on the borrowing and lending request task lists for the defined partner. You can configure the borrowing and lending workflow steps that are available when adding a new partner. (For information on configuring partners, refer to [Resource Sharing Partners](#).) These steps correspond to additional statuses that can be assigned to requests, in addition to certain internally defined statuses that are always available.

For example, a workflow profile may include that a patron can cancel a request and/or renew an item. Workflow profiles are available in the **Borrowing workflow** or **Lending workflow** drop-down list on the Resource Sharing Partner page.

You configure workflow profiles on the Workflow Profiles page ([Configuration Menu > Fulfillment > Resource Sharing > Workflow Profiles](#)).
Workflow profiles that were distributed from a network are indicated by a check mark in the Shared column.

The following actions can be performed on this page:

- Add workflow profiles (see Adding Workflow Profiles)
- Edit workflow profiles (select Edit from the row actions list)
- Delete workflow profiles (select Delete from the row actions list)

If a workflow is associated with a resource sharing partner, you cannot delete it until you first delete the partner.

## Adding Workflow Profiles

The workflow profiles that you add on the institution level are available for all libraries within the institution.

### To add a workflow profile:


   ![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:

   ![Workflow Profile Steps]

---

**Note**

You can configure workflow profiles at the institution level only. Select the required institution from the Configuring filter on the Fulfillment Configuration page.
<table>
<thead>
<tr>
<th>Type</th>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>renew</td>
<td>A request whose profile contains this step is automatically renewed as per the requested due date, and the request's status updates to <strong>Renew Request Accepted</strong>.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong></td>
<td>Automatic renewal is possible only for ISO partners.</td>
</tr>
<tr>
<td></td>
<td><strong>Cancel request not accepted</strong></td>
<td>A cancelation request can be rejected by the partner.</td>
</tr>
<tr>
<td></td>
<td><strong>Canceled by patron</strong></td>
<td>A request can be canceled by a patron.</td>
</tr>
<tr>
<td></td>
<td><strong>Canceled by partner</strong></td>
<td>A request can be canceled by the lending partner and notification is received by the borrowing partner.</td>
</tr>
<tr>
<td></td>
<td><strong>Canceled by staff</strong></td>
<td>A request can be canceled by a staff member.</td>
</tr>
<tr>
<td></td>
<td><strong>Conditional</strong></td>
<td>Support <strong>Conditional</strong> status and conditional replies.</td>
</tr>
<tr>
<td></td>
<td><strong>Damaged communicated</strong></td>
<td>A damaged item can be reported by the partner. When enabled, the <strong>Damaged</strong> row action is enabled for a borrowing request. See <a href="#">Managing Resource Sharing Borrowing Requests</a>.</td>
</tr>
<tr>
<td></td>
<td><strong>Declared lost by partner</strong></td>
<td>An item can be declared lost by the partner.</td>
</tr>
<tr>
<td></td>
<td><strong>Externally Obtained</strong></td>
<td>An item can be requested from the CCC GetItNow service.</td>
</tr>
<tr>
<td></td>
<td><strong>Lender check in</strong></td>
<td>The request is not closed by the borrower until a message is received that the item was checked in.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong></td>
<td>This option should not be selected in workflow profiles that are used by broker partners because it causes the request to wait for lender confirmation.</td>
</tr>
<tr>
<td></td>
<td><strong>Lost communicated</strong></td>
<td>A lost item can be reported by the partner. When enabled:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Items noted as lost by the <a href="#">Loans – Overdue and Lost Item</a> job do not generate fines based on a local Terms of Use. Instead, no fine is generated, the request's status changes to <strong>Lost Communicated</strong>, and a letter is sent to the lender.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- The <strong>Lost</strong> row action is enabled for a borrowing request. See <a href="#">Managing Resource Sharing Borrowing Requests</a>.</td>
</tr>
<tr>
<td></td>
<td><strong>Manual renew</strong></td>
<td>Enable manually approving renewal requests for borrowing partners linked to the specified workflow profile.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>For details on system behavior when this option is selected, see the <strong>Renew</strong> and <strong>Renew Reply</strong> entries.</td>
</tr>
<tr>
<td>Type</td>
<td>Step</td>
<td>Description</td>
</tr>
<tr>
<td>--------------</td>
<td>-----------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>in <strong>Workflow Actions</strong></td>
<td></td>
</tr>
<tr>
<td>Mediated</td>
<td>Mediated Patron Renewal</td>
<td>Enable Mediated Patron Renewal to require operator review before renewals are transmitted to the lender. A mediated renewal will display the status of Mediated Patron Renewal while it is waiting for operator review. Once requests are sent to the lending institution, the request status is set to Renew Requested.</td>
</tr>
<tr>
<td>Recalled by</td>
<td>Recalled by partner</td>
<td>The request can be recalled by the partner.</td>
</tr>
<tr>
<td></td>
<td>partner</td>
<td></td>
</tr>
<tr>
<td>Reject</td>
<td>Reject</td>
<td>Reject controls the display of the reject action in the task list of the borrowing request and in the rota tab. It is selected by default. Deselecting Reject removes the reject action from the task list and the rota tab of the request. Also while deselected, the reject action in the action drop down list at the top of borrowing requests is not executed and will display an alert.</td>
</tr>
<tr>
<td>Renew</td>
<td>Renew requested</td>
<td>Enable requesting renewal of resource sharing borrowing requests.</td>
</tr>
<tr>
<td></td>
<td>requested</td>
<td></td>
</tr>
<tr>
<td>Request</td>
<td>Request accepted</td>
<td>A requested item can be accepted by the partner.</td>
</tr>
<tr>
<td></td>
<td>accepted</td>
<td></td>
</tr>
<tr>
<td>Waiting for</td>
<td>Waiting for cancel response</td>
<td>When this option is selected, if a borrower cancels a request, the request will not actually be canceled until the lender sends a cancellation response.</td>
</tr>
<tr>
<td></td>
<td>receive digitally</td>
<td>This determines when the lender can close a request. When selected, a response must be received from the borrower before closing. When not selected, the lender can close the request when shipping digitally.</td>
</tr>
<tr>
<td>Will Supply</td>
<td>Will Supply</td>
<td>A partner can change the status of the request if it has not yet shipped but will soon.</td>
</tr>
<tr>
<td>Lending</td>
<td>Borrower Recall</td>
<td>The recall option is hidden on the borrowing request's row actions when this step is disabled. When the step is enabled, which is the default, the recall option is displayed.</td>
</tr>
<tr>
<td></td>
<td>Cancel reply</td>
<td>Not currently supported</td>
</tr>
<tr>
<td></td>
<td>Conditional</td>
<td>Support Conditional status and conditional replies.</td>
</tr>
<tr>
<td></td>
<td>Lender check in</td>
<td>Sends a confirmation message to the borrower that the item has been checked in.</td>
</tr>
<tr>
<td>Type</td>
<td>Step</td>
<td>Description</td>
</tr>
<tr>
<td>--------------</td>
<td>---------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Patron</td>
<td>renewal</td>
<td>Enable a patron to request renewal of resource sharing items. In addition to enabling this option, you must also ensure that the Is Renewable policy value in the relevant Terms of Use is set to Is Renewable (see Configuring Fulfillment Units, Policies, and Terms of Use).</td>
</tr>
<tr>
<td>Reactivated</td>
<td></td>
<td>Support Reactivate Request action.</td>
</tr>
<tr>
<td>Renewal</td>
<td>response</td>
<td>The borrower requesting renewal waits for a response from the lender before renewal can be carried out. When this step is enabled, the status of a request for which renewal was requested becomes Renew Requested.</td>
</tr>
<tr>
<td>Staff renewal</td>
<td></td>
<td>Renewal can be invoked by a staff member. When this step is enabled, the Renew link appears on the Resource Sharing Borrowing Requests page.</td>
</tr>
</tbody>
</table>

5. Select one of the following:
   - **Add** - Add the workflow profile but leave the dialog box open so that you can add additional workflow profiles.
   - **Add and Close** - Add the workflow profile and close 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 Rota Assignment Rules**

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 (Configuration Menu > Fulfillment > Resource Sharing > Rota Assignment Rules). For more information about rules tables, see Rules Tables.
Rota assignment rules can be configured at the Network Zone, institution, or library level.

In a collaborative network, you can configure rota templates in the Network Zone and have the changes distributed to the member institutions by a job. For more information, see Configuring Fulfillment Information in the Network Zone.

The following actions can be performed on this page:

- Configure rota assignment rules for an institution
- Configure rota assignment rules for a library

To configure rota assignment rules for an institution:


2. In the Rota Assignment Rules section, enter a rule for the name in the Name field.

3. Configure input parameters: these parameters specify the conditions (Name, Operator, and Value) for which the rota template specified by the output parameter is assigned to the request.
- Name: One of:
  - Level of Service - Assigned when the request requires one of the selected levels of service
  - Price - Assigned when the request's price is greater than, equal to, or less than the specified price
  - Requested Format - Assigned when the request requires one of the specified request types
  - Required in Number of Days - Assigned when the requested duration is greater than, equal to, or less than the specified number of days
  - User Group - Assigned when the user making the request is in one of the specified user groups

- Operator - a comparison operator

- Value: These depend on the Name parameter:
  - Level of Service - Select one (or more) levels of service (see Level of Service in Manually Adding a Borrowing Request).
  - Price - Enter a price. If this value is less than 1, enter a leading 0. For example, 0.44, not .44.
  - Requested Format - Select one (or more) requested formats (see Requested Format in Manually Adding a Borrowing Request).
  - Required in Number of Days - Enter a number of days.
  - User Group - Select one (or more) predefined user groups.

4. Configure output parameters in the relevant fields: Select the rota template that is applied when the conditions specified by the input parameters are met.

5. Select Save. The configured rule appears on the 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, select the Recalculate Rota Assignment link on the Resource Sharing Borrowing Requests page (see Manually Adding a Request).

When the rota assignment is recalculated, if the first partner in the list is inactive, the assignment process continues searching until it finds a partner in an active status.

To configure rota assignment rules for a library:

1. On the Rota Assignment Rules List page, ensure that a library is selected in the Configuring filter at the top of the page. Rules configured on the library level appear in the Library Rules List section and rules configured on the institution level display in the Institution Rules List section.
2. To add a rule, select **Add Rule** and see the above steps for configuring a rule for an institution.

3. To copy an institution rule to the library level:
   1. In the Institution Rules List section, select **Copy to Library**. The Rota Assignment Rules page appears.
   2. Modify the rule parameters, as required, and select **Save**. The specified rule appears in the Library Rules List section.

**Configuring Locate Profiles**

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. For more information, see **Locating Items**.


**Note**

Locate profiles can be configured at the institution level only. Select the required institution from the **Configuring** filter.
Locate profiles that were distributed from a network are indicated by a check mark in the Shared column.

The following actions can be performed on this page:

- Add locate profiles (see Adding Locate Profiles)
- Edit locate profiles (select Edit from the row actions list; the fields appearing on the Locate Profile Parameters tab page depend on the type of locate profile selected)
- Duplicate locate profiles (select Duplicate from the row actions list and modify the relevant fields)
- Delete locate profiles (select Delete from the row actions list)

Adding Locate Profiles

You can add a locate profile to Alma.

To add a locate profile:


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 - The sharing institution also uses Alma.
   - No Locate - The default partner is used and therefore no attempt is made to locate another partner.
   - Z39.50 - The Z39.50 communications protocol is used for searching remote catalogs. For details on the Z39.50 protocol, see https://developers.exlibrisgroup.com/alma/integrations/Z39.50
   - BLDSS - The BLDSS API is used for searching the British Library catalogs. For more information, see British Library Document Supply Service (BLDSS).
   - Fulfillment Network - The fulfillment network type is used for institutions that share the same fulfillment network. For more information, see Automated Fulfillment Network Requests (AFN).

4. Select Next. The second page of the wizard opens. The page differs based on profile type, with the different profile types described in the steps below.

Note

If the No Locate profile type was selected, no additional parameters can be configured. Select Save to save the
5. For an **Alma** profile type, configure the following fields:

- In the **Server** field, enter the URL of the target Alma.
- In the **Port** field, enter the port number on which the external Alma system is located. This field may also be left blank.
- In the **Username** field, enter the username of the Z39.50 external interface in the target Alma system.
- In the **Password** field, enter the password of the Z39.50 external interface in the target Alma system. The characters you enter are encrypted.
- In the **Institution** field, enter the institution in which the external Alma system is located.
- For members of a Network Zone institution, select the **Alma network** check box to search against the Network Zone itself rather than each institution's local catalog. Selecting this field also allows sharing this locate profile among all the network members. When checked, the Alma network code must be entered in the **Institution** field. When this check box is selected, the **Check item availability** and **Check item requestability** check boxes are deactivated.
- Select the **Check item availability** check box for the profile to check whether an item is available in the institution. An item is available if its status is **Item in Place**.
- Select the **Check item requestability** check box for the profile to check whether an item can be requested as part of a resource sharing request.

**Note**

- You can select either the **Alma network** or **Check item availability** and **Check item requestability** check boxes, but not all three.
- Availability and requestability are checked on the institution level only.
Select the **Ignore Electronic and Digital Resources** check box for the profile to check only for physical items. Any partner that contains only electronic and/or digital items is skipped in the rota.

Select the **Ignore Physical Resources** check box for the profile to check only for electronic and digital items. Selecting this field means that the locate process does not check physical resources and does not use the locate by, check item availability, or requestability fields.

Select the **Allow Locate by Metadata** check box to successfully locate an item even when the request between partners that share a Network Zone was not placed from the shared Network Zone discovery system. In this case, the locate process will use the request’s metadata to find a match in the partner’s catalog.

This option allows borrowers that share a Network Zone with the lenders to create resource sharing requests for records that are not shared in the Network Zone. It also allows hold requests to be converted to resource sharing requests even if the borrower and lender share a Network Zone.

Select the **Locate by Fields** check box to configure additional search fields when locating a resource for a borrowing request. The page refreshes and displays additional fields:

- Title
- Author
- ISBN/ISSN
- OCLC Number
- Edition
- LCCN

Select the fields by which you want resources to be searched for in the remote institution. Alma uses these fields when the specified locate profile is used in a search by the resource sharing partner (that is, when selecting Locate Resource on the Resource Sharing Borrowing Requests page).

Select **Test Connection** to check connectivity to the server. (This doesn't check the authentication parameters.)

6. For a **Z39.50** profile type, configure the displayed fields, as follows:

1. To add holdings to the search, select the **Enrich with holdings** check box. The holding field and subfield fields appear. Enter the relevant values in the fields. In this field+subfield, the partner's holdings code will be searched in the Bib record that is retrieved from the external resource. For the holdings code, see Resource Sharing Partners.
2. Select the **Find resource** field to search for a resource. The Search External Resource Setup page appears.
3. Enter search criteria in the **Find** box to search for a resource, and select **Go**. The Search External Resource Setup page appears. Choose an entry and select **Select** to return to the Locate Profile Details page.
4. In the **Credentials** field, enter any relevant credentials for the search.
5. Select **Test Connection** to check connectivity to the server. (This doesn't check the authentication parameters.)

7. For a **BLDSS** profile type, configure the displayed fields, as follows:

1. Select **Succeed on possible match** to force the locate process to succeed even if the British Library determines that there are a number of possible matches.
2. Select **Check availability** to match only on British Library resources that are readily available. This option is recommended if you would like to request a BL resource only if it is available for immediate supply.
3. The **Locate By Fields** option enables configuring what metadata will be used by the locate process. This parameter is optional and may be left unchecked. The system will then use its internal defaults.

8. For a **Fulfillment Network** profile type, configure the displayed fields, as follows:

1. In the **Server** field, enter the URL of the target Alma.
2. In the Port field, enter the port number on which the external Alma system is located. This field may also be left blank.

3. In the Username field, enter the username of the external interface in the target Alma system.

4. In the Password field, enter the password of the external interface in the target Alma system. The characters you enter are encrypted.

5. In the Institution field, enter the institution in which the external Alma system is located.

6. Select the Check item availability check box for the profile to check whether an item is available in the institution. An item is available if its status is Item in Place.

7. Select the Check item requestability check box for the profile to check whether an item can be requested as part of a resource sharing request.

8. Select Test Connection to check connectivity to the server. (This doesn't check the authentication parameters.)

---

**Configuring Shipping Cost Lender Rules**

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:**


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).

Configuring Shipping Cost Borrower Rules

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:


   ![Shipping Cost – Borrower Rules Page](image)

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).

Configuring Sending Borrowing Request Rules

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 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 appear on the Sending Borrowing Request Rules List page (Configuration Menu > Fulfillment > Resource Sharing > Sending Borrowing Request Rules). For more information about rules tables, see...
Rules Tables.

Sending Borrowing Request Rules List Page

Sending borrowing request rules that have been distributed from a network is indicated by a check mark in the Network Rules List section of the page. The network\_sending\_rules\_precedence parameter determines whether the network, institution, or library level rules are executed first. For more information, see Configuring Other Settings.

The following actions can be performed on this page:

- Add sending borrowing request rules (see Adding Sending Borrowing Request Rules)
- Edit sending borrowing request rules (select Edit from the row actions list)
- Duplicate sending borrowing request rules (select Duplicate from the row actions list and modify the relevant fields)
- Delete sending borrowing request rules (select Delete from the row actions list)
- Edit the Default Sending Borrowing Request Rule (select Edit from the row actions list of the default rule)
- Disable a sending borrowing request rule

**Note**

Automatic send rules are activated only following a manual or automatic locate process.

---

**Adding Sending Borrowing Request Rules**

You can add a Sending Borrowing Request Rule.

To add sending borrowing request rules:

2. In the Sending Borrowing Request Rules section, enter a name in the Name field.

3. Configure input 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). Input parameters are:
   - Converted from Hold Request - True or False
   - Missing Article Metadata Fields - Choose one or more of the metadata fields
   - Missing Book Metadata Fields - Choose one or more of the metadata fields
   - Partner - Choose one or more of the configured resource sharing partners
   - Price - Enter a decimal amount
   - Requested Format - Valid options are Digital, Physical, and Physical non-returnable
   - Self Ownership - Select True or False
   - User Group - Choose one or more of the configured user groups

4. Configure output parameter. The only output option is Send Request, which can be set to True or False. If the input value specified above is found on the request, the output parameter determines if the request is sent.

5. Select Save. The configured rule appears on the 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.

---

Configuring Patron Queries

The Query to Patron Letter is sent to the patron when a user selects Send Query to Patron on the Borrowing Requests page (Fulfillment > Resource Sharing > Borrowing Requests). Alma provides two systems for configuring these letters in Alma: patron query templates and patron query types.

- Old system: Patron query templates are a basic means of configuring patron letters. You can enter multiple letters and configure the fields in the letters. You cannot edit the initial structure of the letter, but – if configured – you can edit the letter before it is sent.

  This system is deprecated and will be removed in an upcoming Alma version.
• New system: Patron query types use Alma’s flexible XSL style sheet letter configuration system for each query, which is more flexible. You can define up to thirty types of letters that will be sent when a user selects to send a query to a patron, for example a welcome letter, a response to a request, and so forth.

You can configure Alma to use either patron query templates or types, but not both, using the send_query_to_patron_use_xsl parameter in the Customer Parameters Mapping Table. For more information, see Configuring Other Settings.

Note
Patron query types are deployed by default. Patron query templates are deprecated and will be removed in a future version of Alma.

Requests are sent using the Send Query to Patron link beneath a resource request on the Resource Sharing Borrowing Requests page. For information, see Peer-to-Peer Resource Sharing.

Configuring Patron Query Templates
To configure patron query templates, you must have one of the following roles:

• General System Administrator
• Fulfillment Administrator

Patron query templates are configured on the Patron Query Templates mapping table (Configuration Menu > Fulfillment > Resource Sharing > Patron Query Templates). For more information about mapping tables, see Mapping Tables. Each template contains a short list of fields that are assembled to create the letter sent to the patron. The initial format of the letter is not configurable, but – if configured – the letter can be edited before it is sent.

Note
This option appears only when the send_query_to_patron_use_xsl in the Customer Parameters Mapping Table is set to false (see Configuring Other Settings). When send_query_to_patron_use_xsl is set to true, the Patron Query Types option appears instead (see Configuring Patron Query Types).

PatronQueryTemplates Mapping Table Page
The following actions can be performed on this page:

• Add a patron query template (see Adding Patron Query Templates)
• Edit a patron query template (Modify the column values in the Mapping Table Rows section).
• Delete a patron query template (select Delete).
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. Open the PatronQueryTemplates Mapping Table Page ([Configuration Menu > Fulfillment > Resource Sharing > Patron Query Templates](#)).
2. Select Add Row. Enter a name for the template in the Name field.
3. In the Subject field, enter a subject. You can use the variables %reqId% and %reqName%; these will be replaced with the borrowing or lending request’s external ID or the patron’s name, respectively.
4. In the Header field, enter a header, such as “Dear Sir/Madam:”.
5. Enter additional lines in Query Line 1, 2, and 3. These fields are substituted into the Query to Patron Letter. For more information, see [Example Letter Customization: Query to Patron Letter](#).
6. In the Edit if Single field, enter True if the message will be open for editing, or False if the message will be sent directly to the patron without any opportunity for editing.
7. Select Add Row. The template appears in the list of templates.
8. Select Customize.

The fields are assembled into a letter that is sent when a user selects [Send Query to Patron](#) on the Borrowing Requests page. See [Peer-to-Peer Resource Sharing](#).

**Configuring Patron Query Types**

To configure patron query types, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can configure types of letters to be sent to patrons using the enhanced XSL Query to Patron Letter. You can define up to thirty types of letters, for example a welcome letter, a response to a request, and so forth.

Patron query types are configured on the Patron Query Types code table ([Configuration Menu > Fulfillment > Resource Sharing > Patron Query Types](#)). For more information about code tables, see [Code Tables](#).

**Note**

This option appears only when the send_query_to_patron_use_xsl in the Customer Parameters Mapping Table is set to true (see [Configuring Other Settings](#)). When send_query_to_patron_use_xsl is set to false, the Patron Query Templates option appears instead (see [Configuring Patron Query Templates](#)). The Patron Query Templates option will become obsolete in the future.
The following actions can be performed on this page:

- Add a patron query type (see Adding Patron Query Type)
- Edit a patron query type (Modify the column values in the Mapping Table Rows section)

Adding Patron Query Type

You can add a patron query type.

To add a patron query type:

1. On the Patron Query Types Code Table Page (Configuration Menu > Fulfillment > Resource Sharing > Patron Query Types), enable the relevant patron query types.

2. You can modify the enabled entries’ descriptions. Note that the Description column’s text appears in the drop-down of query types (after selecting Send Query to Patron for a Borrowing request), and the code enables you to map the exact text to be used for each query type.
3. You can select enabled entries as templates for the **Send Query to Patron** email, and can modify the entries on the **Query to Patron Letter Code Table** page (see the procedure, below).

4. Select **Save** when you are done.

To configure the Query to Patron letter, see **Example Letter Customization: Query to Patron Letter**.

---

**Configuring Additional Requested Media**

To configure additional requested media, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can expand the granularity of requested resources, enabling a digital request to be requested as an audio or visual file, or a physical request to be requested as a book or a CD. When specifying the exact format in which the resource is required, the lending library processes the request in the requested format.

The options entered in this table appear when adding a borrowing or lending request, depending on the configuration in requested media definitions; see **Configuring Requested Media Definitions**. Also see **Creating a Borrowing Request** and **Creating a Lending Request**.

For information about expanded granularity of requested resources, see the **Greater Granularity When Specifying Requested Media** video (2:57 mins).

Configuring requested media is done on the Additional Requested Media Code Table page (**Configuration Menu > Fulfillment > Resource Sharing > Additional Requested Media**). For more information about code tables, see **Code Tables**.

![Additional Requested Media Code Table Page](image)

**To configure the requestable media types for resource sharing requests:**

See **Code Tables**.

---

**Configuring Requested Media Definitions**

To configure requested media definitions, you must have one of the following roles:

- Fulfillment Services Operator
• Fulfillment Services Manager

You can configure attributes that pertain to the requested media types configured on the Additional Requested Media Code Table page (see Configuring Additional Requested Media). The configurable attributes indicate whether the media types are to be available when submitting borrowing and/or lending requests. You can also configure a media type to not be available for either borrowing or lending requests.

The options entered in this table appear when adding a borrowing or lending request; see Creating a Borrowing Request and Creating a Lending Request.

Configuring media type attributes is done on the Requested Media Definition Mapping Table page (Configuration Menu > Fulfillment > Resource Sharing > Requested Media Definition). For more information about mapping tables, see Mapping Tables.

To specify media types to be available when submitting a resource sharing request:

1. Open the Requested Media Definition Mapping Table page (Configuration Menu > Fulfillment > Resource Sharing > Requested Media Definition). The default requested media types display, as follows:

   ◦ Printed
   ◦ Photocopy
   ◦ Microform
   ◦ Film or video recording
   ◦ Audio recording
   ◦ Machine Readable
   ◦ Any

2. In the Create a New Mapping Row section, you can add the additional media types that were configured on the Additional Requested Media Code Table page (see Configuring Additional Requested Media), as follows:

   1. In the Requested Media field, select a media type. The displayed types are those configured on the Additional Requested Media Code Table page.
   2. In the Include in Borrowing Request field, select whether the media type is to be available when submitting resource sharing borrowing requests.
   3. In the Include in Lending Request field, select whether the media type is to be available when submitting...
resource sharing lending requests.

4. Select **Add Row**. The specified media type displays in the **Mapping Table Rows** table.

3. In the **Mapping Table Rows** table, select **True** or **False** in the **Include in Borrowing Request** and **Include in Lending Request** columns to indicate whether the specified media type is to be available when submitting borrowing requests or lending requests, respectively.

---

**Note**

The **Any** media type must always be specified as **True** for both borrowing and lending requests.

Media types configured as **True** appear in the **Requested Media** field in the following places:

- When creating a borrowing or lending request either manually or from a search (see Resource Sharing).
- In a Ful Outgoing Email Letter, also known as a borrowing request letter, sent to a resource sharing partner when a borrowing request has an active partner of **Type = Email** (see Resource Sharing Requests).
- In a Ful Incoming Slip Letter, also known as a print slip letter, sent when selecting the **Print Slip** link for a lending request (see the relevant description in the Request Sharing Lending Requests Task List Links).
- In a Resource Sharing Shipping Slip Letter, sent when selecting the **Ship Item** link for a lending request, and ensuring that **Automatically Print Slip = Yes** on the resulting Shipping Items page (see the relevant description in the Lending Requests Task List Links table in Workflow Actions).

For information about the letters, see Configuring Alma Letters.

4. Optionally, select **Delete** to delete a media type added from the Quick Add section. You cannot delete the default media types.

---

**Configuring Levels of Service**

To configure levels of service, you must have one of the following roles:

- Fulfillment Services Operator
- Fulfillment Services Manager

You can configure the levels of service that are available for resource sharing requests on the Levels of Service page *(Configuration Menu > Fulfillment > Resource Sharing > Levels of Service)*. For more information about code tables, see Code Tables. You can enable or disable the levels, and you can change the descriptions.
After configuring the levels of service, you can set the field value in the Primo request form and the borrowing and lending requests. The field also appears on the resource sharing task lists (Creating a Borrowing Request) and when creating lending and borrowing rules (Configuring Shipping Cost Lender Rules and Configuring Shipping Cost Borrower Rules).

For more information on Levels of Service, see the Level of Service for Resource Sharing Requests video (3:21).

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### Mapping Alma Library Codes to External Library Codes for Libris ILL

To configure requested media definitions, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can map Alma library codes to library codes in external resource sharing systems. This mapping table can be used in conjunction with the resource sharing integration profile. This enables customers using Libris ILL to map their pickup library codes to Alma codes so that resource sharing requests can be imported into Alma from Libris. Access the Library mapping table (Configuration Menu > Fulfillment > Resource Sharing > Library Mapping). For more information about mapping tables, see Mapping Tables.

Enter the external library code and its corresponding Alma library code.

---

**Levels of Service**

After configuring the levels of service, you can set the field value in the Primo request form and the borrowing and lending requests. The field also appears on the resource sharing task lists (Creating a Borrowing Request) and when creating lending and borrowing rules (Configuring Shipping Cost Lender Rules and Configuring Shipping Cost Borrower Rules).

For more information on Levels of Service, see the Level of Service for Resource Sharing Requests video (3:21).

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**Library Mapping**

You can map Alma library codes to library codes in external resource sharing systems. This mapping table can be used in conjunction with the resource sharing integration profile. This enables customers using Libris ILL to map their pickup library codes to Alma codes so that resource sharing requests can be imported into Alma from Libris. Access the Library mapping table (Configuration Menu > Fulfillment > Resource Sharing > Library Mapping). For more information about mapping tables, see Mapping Tables.

Enter the external library code and its corresponding Alma library code.
Configuring Brief Audit Fields

To configure brief audit fields, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can configure which audit lines will be visible in the resource sharing requests History tab on the Brief Audit Fields code table (Configuration Menu > Fulfillment > Resource Sharing > Brief Audit Fields). For more information about code tables, see Code Tables. You can enable or disable each field. See Managing Resource Sharing Borrowing Requests and Managing Resource Sharing Lending Requests.

Configuring Resource Languages

To configure resource languages, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can enable or disable languages that appear in the Language drop down in the Request Attributes section of a resource sharing request, indicating the desired language of the item being requested. See Managing Resource Sharing Borrowing Requests and Managing Resource Sharing Lending Requests.

Access the Resource Languages page (Configuration Menu > Fulfillment > Resource Sharing > Resource Languages). For more information about code tables, see Code Tables. You can enable or disable a language, reorder the languages, or edit the name of the language.
Configuring Item Policy Exceptions

To configure item policy exceptions, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can configure an item policy exception that indicates that the item should not be shipped for a resource sharing request. Access the Item Policy Exceptions mapping table (Configuration Menu > Fulfillment > Resource Sharing > Item Policy Exceptions). For more information about mapping tables, see Mapping Tables. For more information about item policies, see Configuring Item Policies.

An item policy may be added with the exception set to either True or False. Setting the policy to True will create the item policy exception, which means it will be unavailable for resource sharing. Setting the item policy exception to False means that no exception will be created and the item will continue to be available for resource sharing as previously. The Format may be set to Both, Digital, or Physical. The format is validated when a resource sharing request is created and the item policy exception validation is selected.
Configuring Primo Request Form Type by Genre

To configure the Primo request form type by genre, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can map the OpenURL genre field value to the Primo resource sharing request type selected. By default, Primo opens the request form with book selected by default; the other option is article. Access the Request Form Type by Genre mapping table (Configuration Menu > Fulfillment > Resource Sharing > Request Form Type by Genre). For more information about mapping tables, see Mapping Tables.

![Resource Sharing Request Form Type by Genre](image)

In the quick add section, add the value that appears in the OpenURL genre field. Then select either Article or Book and Add Row. Rows may be enabled or disabled by selecting on the Enabled checkmark.

Configuring Borrowing Request Inactive Filters

To configure the borrowing request inactive filters, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

In order to filter statuses out of the Active display in the Borrowing Requests Task List, access the Borrowing Requests Inactive Filters code table (Configuration Menu > Fulfillment > Resource Sharing > Borrowing Requests Inactive Filters). For more information about code tables, see Code Tables.
Borrowing Request Inactive Filters

Enabling a row means that it appears on the drop-down filter in the borrowing requests task list and it is removed from the display of Active records in the task list. Moving the rows up or down impacts the order in which they appear in the list of the drop-down filter.

### Configuring Borrowing Request Statuses

To configure the borrowing request statuses, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

In order to customize the description and translation text of borrowing request statuses, access the Borrowing Request Statuses code table (Configuration Menu > Fulfillment > Resource Sharing > Borrowing Request Statuses). For more information about code tables, see Code Tables.

This page enables you to define the borrowing request's status text that will be displayed in Primo and in the requests list in the Alma patron services page.
Configuring Request Reject Reasons

To configure the request reject reasons, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

In order to customize the description and translation text of request reject reasons, access the Automatic Locate Reject Reasons code table (Configuration Menu > Fulfillment > Resource Sharing > Automatic Locate Reject Reasons). For more information about code tables, see Code Tables.

This page enables you to define the request's reject text that will be displayed in Primo and in the requests list in the Alma patron services page.

Configuring Renew Reject Reasons

To configure the renew reject reasons, you must have one of the following roles:

- General System Administrator
Fulfillment Administrator

In order to customize the description and translation text of renew reject reasons, access the Automatic Renew Reject Reasons code table (Configuration Menu > Fulfillment > Resource Sharing > Automatic Renew Reject Reasons). For more information about code tables, see Code Tables.

This page enables you to define the request’s renewal rejection text that will be displayed in the Full Borrowing Info letter (code: FulBorrowingInfoLetter) when it is sent to the patron.

Renew Reject Reasons
Discovery Interface Display Logic

Configuring Display Logic Rules

To configure display logic rules, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Display logic rules define when the following fulfillment services should not appear in Primo:

- Booking request – Request to reserve an item at a specific time.
- DB service – Link to the native interface of a third-party database.
- Digitization – Request to have an item or part of an item scanned so that it can be viewed on a computer.
- Full text – View the full text for an item online.
- General electronic services – Links that can be created by an institution for any purpose.
- General hold request – Request to have an item held at a circulation desk when the holdings record is empty, or request an issue for a journal regardless of whether any of its issues have been cataloged. For more information on general hold requests, see Creating a General Hold Request.
- Hold request – Request to have an item held at a circulation desk.
- Open Access – View open access full text (for example, hide open access if full text exists or hide full text if open access exists).
- Purchase request – Request an item to be purchased. For more information, see Purchase Requests.
- Representation Delivery Service – View a digital item.
- Resource sharing request – Request to retrieve an item from another institution when the patron's institution does not have the item.
- Selected full text – Links to full text (full text may not be available to all articles in the Journal).

Note

- For more information about requests, see Requests in Alma.
- For information on how to customize the request forms, see Customizing Primo Request Forms and Customizing Primo Resource Sharing Forms.

You configure display logic rules on the Discovery Interface Display Logic page (Configuration Menu > Fulfillment > Discovery Interface Display Logic > Display Logic Rules).
The following actions can be performed on this page:

- Add a display logic rule (see Adding Display Logic Rules)
- Edit a display logic rule (select Edit from the row actions list)
- Duplicate a display logic rule (select Duplicate from the row actions list)
- Enable or disable a display logic rule. Each row can be enabled or disabled individually with the Active slider. Or select a group of rules and select Deactivate Selected or Activate Selected from the actions.
- Delete a display logic rule (select Remove from the row actions list)

**Note**

You cannot edit the parameters of an existing display logic rule. You can delete the rule and then add a new rule.

See the Discovery - Display Logic Rules training session.

For examples of working with discovery display logic, see Display Logic Rules Examples.

The following display logic rules are available out-of-the-box. These rules are active, by default:

- **Hide service Representation Quick Access** – hides the Quick Access section in Primo VE
- **Hide service Representation Quick Access with Obtrusive Copyrights (Alma representations only) = true** – hides representations with obtrusive copyrights from the Quick Access section in Primo
- **Hide service Representation Delivery Service with Usage Type = Auxiliary** – hides representations with the usage type of Auxiliary from the Quick Access section in Primo

### Adding Display Logic Rules

You can add new display logic rules. Rules apply for all libraries in the institution. By default, new rules are enabled.

**To add a new display logic rule:**

2. From the For user from groups drop-down list, select one or more groups to which to apply the rule. If you do not select a group, the rule applies to all user groups.

3. In the Hide service drop-down list, select the service(s) that the rule hides.

Depending on your selection, either with or without fields (or both) appear to allow you to provide a logical constraint about when to hide the service. The fields that appear depend on your selection. See the following table.

- **with** – Optionally select the type of service for which this service will not appear: Electronic Collection, Interface, or Service.

- **with value** – Optionally enter one or more specific packages, interfaces, or service names for which this service will not appear.

<table>
<thead>
<tr>
<th>Hide Service</th>
<th>with</th>
<th>with value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Booking, Digitization, General Hold Request, Hold Request</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>DB Service</td>
<td>Electronic</td>
<td>Collection</td>
</tr>
<tr>
<td>Full Text, Selected Full Text, General Digitization Request</td>
<td>Interface</td>
<td>Collection</td>
</tr>
<tr>
<td></td>
<td>Electronic</td>
<td>Collection</td>
</tr>
<tr>
<td>General Electronic Service</td>
<td>Service</td>
<td>Select a general electronic service.</td>
</tr>
<tr>
<td>Open Access</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Note that this service appears when the enable_open_access_services_from_unpaywall_api customer parameter is set to true. See Open Access for more information.</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Purchase Request</td>
<td>Availability by the campus</td>
<td>Select true to hide the service if the resource cannot be requested for availability on the campus. Otherwise, select false.</td>
</tr>
<tr>
<td>Availability by the institution</td>
<td>Select true to hide the service if the resource cannot be requested for availability on the institution. Otherwise, select false.</td>
<td></td>
</tr>
<tr>
<td>Ownership by the campus</td>
<td>Select true to hide the service if the resource cannot be requested for ownership by the campus. Otherwise, select false.</td>
<td></td>
</tr>
<tr>
<td>Ownership by the institution</td>
<td>Select true to hide the service if the resource cannot be requested for ownership by the institution. Otherwise, select false.</td>
<td></td>
</tr>
<tr>
<td>Representation Delivery Service, Representation Quick Access</td>
<td>Access Rights</td>
<td>Select true to hide the service if the resource has access rights configured. Otherwise, select false.</td>
</tr>
<tr>
<td>Hide Service</td>
<td>with</td>
<td>with value</td>
</tr>
<tr>
<td>--------------</td>
<td>------</td>
<td>------------</td>
</tr>
<tr>
<td>Public Note</td>
<td></td>
<td>Hide a representation in Primo, depending on the value of the <strong>Public Note</strong> field of the representation. The following are examples of regular expressions with which you can configure the Display Logic Rules to hide representations when the expressions are in the <strong>Public Note</strong> field. A flag can be used to determine if the expression is case sensitive or not:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- /Restricted Access/i - Matches a public note containing the phrase <strong>Restricted Access</strong>, case insensitive.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- /(?!Open Access$) - Matches a public note that does not equal <strong>Open Access</strong>, case sensitive.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- /(?!Open Access).)*$/i - Matches a public note that does not contain the phrase <strong>Open Access</strong>, case insensitive.</td>
</tr>
<tr>
<td>Usage Type</td>
<td></td>
<td>Select <strong>master</strong> to hide the service for representations with the usage type of master and select <strong>derivative</strong> to hide the service for representations with the usage type of derivative.</td>
</tr>
<tr>
<td>Representation Type</td>
<td></td>
<td>Select <strong>remote</strong> to hide the service for remote representations and select <strong>non-remote</strong> to hide the service for remote representations.</td>
</tr>
<tr>
<td>Viewer</td>
<td></td>
<td>Select a viewer to hide the service if the resource is configured to be displayed by that viewer.</td>
</tr>
<tr>
<td>Obtrusive Copyrights (Representation Quick Access only)</td>
<td></td>
<td>Hide the service if the resource is configured with obtrusive copyrights enabled.</td>
</tr>
<tr>
<td>Availability by the campus</td>
<td></td>
<td>Select <strong>true</strong> to hide the service if the resource is available on campus. Otherwise, select <strong>false</strong>.</td>
</tr>
<tr>
<td>Availability by the institution</td>
<td></td>
<td>Select <strong>true</strong> to hide the service if the resource is available at the institution. Otherwise, select <strong>false</strong>.</td>
</tr>
<tr>
<td>Ownership by the campus</td>
<td></td>
<td>Select <strong>true</strong> to hide the service if the resource is owned by the campus. Otherwise, select <strong>false</strong>.</td>
</tr>
<tr>
<td>Ownership by the institution</td>
<td></td>
<td>Select <strong>true</strong> to hide the service if the resource is owned by the institution. Otherwise, select <strong>false</strong>.</td>
</tr>
<tr>
<td>Resource Sharing System</td>
<td></td>
<td>Select a resource sharing system.</td>
</tr>
</tbody>
</table>

4. To hide the service if another service exists, in the **If exists service** multiple select drop-down list, select the other service(s).

Depending on your selection, either with or without fields (or both) appear to allow you to provide a logical constraint about the existence of the other service. See the table above for information about the fields.
5. Select one of the following:
   - Add – Add the rule but leave the dialog box open so that you can add additional rules.
   - Add and Close – Add the rule and close the dialog box.

6. If you define 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. Alma applies the enabled rules in the configured order.

**Display Logic Rule Examples**

The following rule hides the display of EBSCOhost Consumer Health Complete if the service page includes or displays any full text from EBSCOhost.

**Note**

EBSCOhost is identified as the interface in this example.

---

![Example Display Logic Rule](image)

**Example Display Logic Rule**

The following rule specifies that if full text is available from Factiva, hide the display of full text from all other packages and interfaces (which is indicated by the blank options associated with the hide service parameter).
Configuring Service Labels in the Discovery Interface

To configure labels, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Note

This section applies only to Primo. For information regarding Primo VE and Alma-Summon environments, see the following pages:

- Configuring Display Labels for Primo VE
- Configuring Display Labels for Alma-Summon

The Discovery Interface Labels Code Table page (Configuration Menu > Fulfillment > Discovery Interface Display Logic > Labels) contains predefined labels that appear in Primo. You cannot add or remove these labels, but you can edit the label’s text to meet your requirements. For more information about code tables, see Code Tables.
In addition, you can add HTML code to these fields to change the display of labels. For example, if you modify the following field as indicated, the output appears as displayed in the figure below.

- c.uresolver.request.request_type = Request Type: <font color=red>ALL FIELDS REQUIRED!</font>

List of Commonly Used Labels

<table>
<thead>
<tr>
<th>Label Code</th>
<th>Default Value</th>
<th>Location in Interface</th>
</tr>
</thead>
<tbody>
<tr>
<td>c.search.htmlCreator.unifiedDisplay</td>
<td>(0) copy, (0) available, (0) requests Formatted as: {{copies_labels}}, {{available_labels}}, {{requests_labels}}. All content in curly brackets cannot be changed or translated because they represent other labels. Text can be added before, after or between each pair of curly brackets. Or one of the labels can be removed.</td>
<td>Displays the count in the items list.</td>
</tr>
</tbody>
</table>

- Brackets within the new label: {{copies_labels}} will be populated with information from these existing labels:
  - c.search.htmlCreator.copy for a single copy
  - c.search.htmlCreator.copies if there are multiple copies

- Brackets within the new label: {{available_labels}} will be populated with information from this existing labels:
  c.search.htmlCreator.available. If you
<table>
<thead>
<tr>
<th>Label Code</th>
<th>Default Value</th>
<th>Location in Interface</th>
</tr>
</thead>
<tbody>
<tr>
<td>have configured Time to reshelved, the</td>
<td></td>
<td>following labels may replace it:</td>
</tr>
<tr>
<td>following labels may replace it:</td>
<td></td>
<td>- c.uresolver.getit2.item_list.status.SOME_HOLDING_ITEMS_AWAITING_RESHELVING,</td>
</tr>
<tr>
<td>following labels may replace it:</td>
<td></td>
<td>- c.uresolver.getit2.item_list.status.ALL_HOLDING_ITEMS_AWAITING_RESHELVING.</td>
</tr>
<tr>
<td>following labels may replace it:</td>
<td></td>
<td>- Brackets within the new label: {{requests_labels}} will be populated with information from these existing labels:</td>
</tr>
<tr>
<td>following labels may replace it:</td>
<td></td>
<td>- c.search.htmlCreator.request if there is a single request</td>
</tr>
<tr>
<td>following labels may replace it:</td>
<td></td>
<td>- c.search.htmlCreator.requests If there are multiple requests</td>
</tr>
<tr>
<td>following labels may replace it:</td>
<td></td>
<td>- c.search.htmlCreator.noRequests if there are no requests</td>
</tr>
<tr>
<td>c.uresolver.locate</td>
<td>Locate</td>
<td>Link to locate location in library (location map). Appears both in items list (when only one holding) and holdings list (when more than one holding).</td>
</tr>
<tr>
<td>c.uresolver.request</td>
<td>Request</td>
<td></td>
</tr>
<tr>
<td>c.uresolver.request.submitSuccessfully</td>
<td>Request Placed</td>
<td>This label displays in Get It after a request has been submitted.</td>
</tr>
<tr>
<td>c.uresolver.request.placeInQueue</td>
<td></td>
<td>For customers that went live before the August 2019 release, the default value is: Place in queue is {0}.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>For customers going live in August 2019 or later, the default value is: {0} user(s) before you get served.</td>
</tr>
<tr>
<td>c.uresolver.request.submitFailed</td>
<td>Failed to place a request on the resource. Please contact the library.</td>
<td></td>
</tr>
<tr>
<td>c.uresolver.request.title</td>
<td>Details of title you requested:</td>
<td></td>
</tr>
<tr>
<td>c.uresolver.request.notNeededAfter</td>
<td>Not Needed After:</td>
<td></td>
</tr>
<tr>
<td>c.uresolver.request.Partial.madatoty_comment</td>
<td>Please add the part to digitize</td>
<td></td>
</tr>
<tr>
<td>c.uresolver.request.institution_dropdown_my_institution</td>
<td>My Institution</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>In fulfilment network configuration, the pickup location selection in the request</td>
</tr>
<tr>
<td>Label Code</td>
<td>Default Value</td>
<td>Location in Interface</td>
</tr>
<tr>
<td>------------</td>
<td>---------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>c.uresolver.request.institution_dropdown_other_institutions</td>
<td>Other Institutions</td>
<td>In fulfillment network configuration, the pickup location selection in the request form displays a label, Other Institution, above the additional options.</td>
</tr>
<tr>
<td>c.uresolver.request.comment</td>
<td>Comment:</td>
<td>This label displays on the Request form.</td>
</tr>
<tr>
<td>c.uresolver.request.manualDescription</td>
<td>Manual Description:</td>
<td>The Request a different issue link appears in Get It if the item has a description or the resource holding has a summary holdings field. This allows users to request items that may have not been cataloged. After selecting the Request a different issue link, this label appears on the request form.</td>
</tr>
<tr>
<td>c.uresolver.request.submitRequest</td>
<td>Request</td>
<td>This label displays for the Request button at the bottom of the Request form.</td>
</tr>
<tr>
<td>c.uresolver.request.refresh</td>
<td>Refresh Services List</td>
<td>After submitting a request, the Refresh Services List link appears in Get It.</td>
</tr>
<tr>
<td>c.search.htmlCreator.copy</td>
<td>copy</td>
<td>Displays the count of total copies and copies available (X copy, Y available) in the items list.</td>
</tr>
<tr>
<td>c.search.htmlCreator.copies</td>
<td>copies</td>
<td>Availability display</td>
</tr>
<tr>
<td>c.search.htmlCreator.request</td>
<td>request</td>
<td>Availability display</td>
</tr>
<tr>
<td>c.uresolver.ServicesForThisTitle</td>
<td>Services For This Title</td>
<td></td>
</tr>
<tr>
<td>c.uresolver.GeneralElectronicServices</td>
<td>Additional services</td>
<td>This label appears in View It when there are General Electronic services available.</td>
</tr>
<tr>
<td>c.uresolver.ServicesForRelatedTitles</td>
<td>Services For Related Titles</td>
<td>This label appears in View It when there are related records.</td>
</tr>
<tr>
<td>c.uresolver.availableOnline.full_text_prefix</td>
<td>Full text available at:</td>
<td>The label appears in View It when there is full text services available.</td>
</tr>
<tr>
<td>c.uresolver.availableOnline.selected_full_text_prefix</td>
<td>Selected full text available at:</td>
<td>The prefix for a full text link in View It.</td>
</tr>
<tr>
<td>c.uresolver.emptyList</td>
<td>No full text available</td>
<td>This label appears in View It when there is no full text services available.</td>
</tr>
<tr>
<td>c.uresolver.error</td>
<td>We're sorry. An error occurred while retrieving services for this title.</td>
<td>This label appears in Get It and View It if there was a processing error.</td>
</tr>
<tr>
<td>c.uresolver.request.ill</td>
<td>Resource Sharing Request:</td>
<td>This label appears at the top of the Resource Sharing Request form.</td>
</tr>
<tr>
<td>Label Code</td>
<td>Default Value</td>
<td>Location in Interface</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>c.uresolver.request.ill.citationType.book</td>
<td>Book</td>
<td>This label appears as an option for the Citation Type field on the Resource Sharing Request form.</td>
</tr>
<tr>
<td>c.uresolver.request.ill.citationType.article</td>
<td>Article</td>
<td>This label appears as an option for the Citation Type field on the Resource Sharing Request form.</td>
</tr>
<tr>
<td>c.uresolver.request.ill.format.physical</td>
<td>Physical</td>
<td>This label is found on the Resource Sharing Request tab &gt; Delivery Information &gt; Format &gt; Physical.</td>
</tr>
<tr>
<td>c.uresolver.request.ill.format.digital</td>
<td>Digital</td>
<td>This label is found on the Resource Sharing Request tab &gt; Delivery Information &gt; Format &gt; Digital.</td>
</tr>
<tr>
<td>c.uresolver.request.ill.format.physicalNonReturnable</td>
<td>Physical non-returnable</td>
<td>This label is found on the Resource Sharing Request tab &gt; Delivery Information &gt; Format &gt; Physical non-returnable.</td>
</tr>
<tr>
<td>c.uresolver.request.ill.delivery.library</td>
<td>Deliver to library</td>
<td>This label is found on the Resource Sharing Request tab &gt; Delivery Location &gt; Delivery to Library.</td>
</tr>
<tr>
<td>c.uresolver.request.ill.delivery.alternative</td>
<td>Alternative address</td>
<td>This label is found on the Resource Sharing Request tab &gt; Delivery Location &gt; Alternative address.</td>
</tr>
<tr>
<td>c.uresolver.request.ill.volume</td>
<td>Volume:</td>
<td>This label displays on the Resource Sharing Request form for both articles and books.</td>
</tr>
<tr>
<td>c.uresolver.request.ill.issue</td>
<td>Issue:</td>
<td>This label displays on the Resource Sharing Request form for articles.</td>
</tr>
<tr>
<td>c.uresolver.availableOnline.service_is_temporary_unavailable_due_to</td>
<td>Service temporarily unavailable due to a Service unavailability reason has been defined in Alma (see figure below).</td>
<td></td>
</tr>
<tr>
<td>c.uresolver.availableOnline.service_is_temporary_unavailable</td>
<td>Service temporarily unavailable</td>
<td>This label appears in View It when the service is temporarily unavailable and there is no Service unavailability reason.</td>
</tr>
<tr>
<td>Label Code</td>
<td>Default Value</td>
<td>Location in Interface</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>-------------------------</td>
<td>-----------------------------------------------</td>
</tr>
<tr>
<td>c.uresolver.getit2.request.request_options</td>
<td>Request Options:</td>
<td>This label appears next to the list of request options in Get It.</td>
</tr>
<tr>
<td>c.uresolver.getit2.request.monograph</td>
<td>Request</td>
<td>This label appears for the Request link in Get It. If all items are monographs, the link will be at the title level.</td>
</tr>
<tr>
<td>c.uresolver.getit2.request.serial</td>
<td>Request</td>
<td>This label appears for the Request link in Get It. If there are serial items, the link will be at the item level.</td>
</tr>
<tr>
<td>c.uresolver.getit2.request.noltems</td>
<td>Don't see what you need? Request Anyway</td>
<td>This request option appears when the item is not available at this location. Select the link to create a request.</td>
</tr>
<tr>
<td>c.uresolver.getit.related_title_display</td>
<td>Inventory of related &quot;(0)&quot; is listed below</td>
<td></td>
</tr>
<tr>
<td>c.uresolver.getit2.holding_list.location_map</td>
<td>Location Map</td>
<td>This is the column title for the Locate links in the holdings list.</td>
</tr>
<tr>
<td>c.uresolver.getit2.holding_list.related_holdings</td>
<td>Related holdings</td>
<td>This is the label that appears with related holdings. See the Enabling the Display of Related Records in Primo section for more information.</td>
</tr>
<tr>
<td>c.uresolver.getit2.ill_request.monograph</td>
<td>Resource sharing request</td>
<td>The Resource Sharing Request link displays in the request options at the title level when all items are monographs (without description) or there are no holdings.</td>
</tr>
<tr>
<td>c.uresolver.getit2.ill_request.serial</td>
<td>Resource sharing request</td>
<td>The Resource Sharing Request link displays in the request options at the title level when at least one of the items is serial (with description) or no items exist.</td>
</tr>
<tr>
<td>c.uresolver.getit2.digitization_request.monograph</td>
<td>Digitization</td>
<td>The Digitization Request link displays in the request options at the title level when all items are monographs (without description) or there are no holdings.</td>
</tr>
<tr>
<td>c.uresolver.getit2.digitization_request.serial</td>
<td>Digitization</td>
<td>The label displays in the holding item digitization service in Primo Get It.</td>
</tr>
<tr>
<td>c.uresolver.getit2.display_related_holding_</td>
<td>LOCATIONS FOR RELATED TITLES</td>
<td>The label that appears above the list of</td>
</tr>
<tr>
<td>Label Code</td>
<td>Default Value</td>
<td>Location in Interface</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>-------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>separately_from_original_record</td>
<td></td>
<td>related holdings if the <strong>Separately from the original record holdings</strong> option is selected. See the <a href="#">Enabling the Display of Related Records in Primo</a> section for more information.</td>
</tr>
</tbody>
</table>
| c.uresolver.getit2.display_related_holding     | Alma-Primo: Related title:{0} (1)  
Primo VE: Related title:{0}                                                          | Appears in Get It to indicate that the physical title is related to the record. For Alma-Primo environments only, the type of relation is appended to the end of the title. For example:  
Related title:Art / (Contains) |
<p>| c.uresolver.getit2.item_list.pagination.records | Records                                                                       |                                                                                         |
| c.uresolver.getit2.item_list.type              | Type                                                                          | The <strong>Type</strong> column is in the holding item in Primo Get It.                              |
| c.uresolver.getit2.item_list.policy            | Policy                                                                        | The <strong>Policy</strong> column is in the item list in Primo Get It.                               |
| c.uresolver.getit2.item_list.status            | Status                                                                        | The <strong>Status</strong> column is in the holding item in Primo Get It.                            |
| c.uresolver.getit2.item_list.empty             | No items exist. Please refer to the request options above                     | The label is in the items list when there is a holding without items.                   |
| c.uresolver.getit2.request_different           | Request a different issue                                                     | The <strong>Request a different issue</strong> link will appear in Primo Get It if the item has a description or the resource holding has a summary holdings field. This will enable requesting items that may have not been cataloged. |
| c.uresolver.getit2.digitize_different          | Digitize a different issue                                                   | The <strong>Digitize a different issue</strong> column is in the holding item in Primo Get It.       |
| dlf.block.expiry                               |                                                                              | Configure with {0} to display the user's block expiry on the My Account page. For example, entering <strong>Expired on {0}</strong> in the label description will be displayed as <strong>Expired on 07/07/2017</strong>. |
| dlf.onHoldShelf.until                          | until {0}                                                                     | This label appears in the <strong>List of Requests</strong> in My Account. The first part of the status is based on the status and therefore may not be configured. Only the text of <strong>until {0}</strong> is configurable. |</p>
<table>
<thead>
<tr>
<th>Label Code</th>
<th>Default Value</th>
<th>Location in Interface</th>
</tr>
</thead>
<tbody>
<tr>
<td>c.uresolver.request.part_to_digitize</td>
<td>Part to Digitize:</td>
<td>The label is in the digitization request in Primo Get It.</td>
</tr>
<tr>
<td>c.uresolver.getit2.holding_list.empty.top</td>
<td>Your search did not match any physical resource in the library</td>
<td>When there are no holdings, this is the first row in Primo Get It (if the user is signed in).</td>
</tr>
<tr>
<td>c.uresolver.getit2.holding_list.empty.signed_in_user</td>
<td>Use the link/s below in order to request the resource from other libraries</td>
<td>When there are no holdings, this is the second row in Primo Get It (if the user is signed in).</td>
</tr>
<tr>
<td>c.uresolver.getit2.holding_list.empty.no_services</td>
<td>There are no services available</td>
<td>When there are no holdings and no services, this is the message shown in Primo Get It (if the user is signed in).</td>
</tr>
<tr>
<td>c.uresolver.getit2.holding_list.empty.bottom</td>
<td>Having problems? Please contact the Ex Libris staff</td>
<td>When there are no holdings, this description is shown at the bottom in Primo Get It (if the user is signed in).</td>
</tr>
<tr>
<td>c.uresolver.getit2.holding_list.empty.guest_user</td>
<td>In order to receive options to request the resource from other libraries, please sign in.</td>
<td>When there are no holdings and user is not signed in, this is shown in Primo Get It.</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.non_circulating</td>
<td>Not loanable</td>
<td>When item is not loanable (according to policy), the Policy under the item list will be Not loanable.</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.circulating</td>
<td>Loanable</td>
<td>When the item is loanable (according to policy), the Policy under the item list will be Loanable.</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.alt_call_number_prefix</td>
<td>Additional location information:</td>
<td>A prefix for the alternative call number appears next to an item description in the Get It items page,</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.status.ITEM_NOT_IN_PLACE</td>
<td>Item not in place</td>
<td>This is a status in the item list.</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.status.ITEM_IN_PLACE</td>
<td>Item in place</td>
<td>This is a status in the item list.</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.status.ACQ.with_expected_date</td>
<td>On order until (0)</td>
<td>This is a status in the item list (expiration date is included).</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.status.TRANSIT.with_expected_date</td>
<td>In transit until (0)</td>
<td>This is a status in the item list (expected arrival time is included).</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.status.NOPROCESS.with_no_expected_date</td>
<td>On Shelf</td>
<td>This is a status in the item list.</td>
</tr>
<tr>
<td>Label Code</td>
<td>Default Value</td>
<td>Location in Interface</td>
</tr>
<tr>
<td>---------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.status.WORK_ORDER_DEPARTMENT. with_expected_date</td>
<td>In process of (0) until (1)</td>
<td>This is a status in the item list (expiration date is included).</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.status.LOST_LOAN.with_expected_date</td>
<td>Lost since (0)</td>
<td>This is a status in the item list.</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.status.CLAIM_RETURNED_LOAN. with_expected_date</td>
<td>Claimed returned. Due on (0)</td>
<td>This is a status in the item list (due date is included).</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.status.LOAN.with_expected_date</td>
<td>On loan until (0)</td>
<td>This is a status in the item list.</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.status.OVERDUE.with_expected_date</td>
<td>On loan - overdue since (0)</td>
<td>This is a status in the item list.</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.status.WORK_ORDER_DEPARTMENT. with_no_expected_date</td>
<td>In process of (0)</td>
<td>This is a status in the item list.</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.status.ILL.with_expected_date</td>
<td>On ILL process until (0)</td>
<td>This is a status in the item list (when the Resource Sharing request has a due date.)</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.status.ILL.with_no_expected_date</td>
<td>On ILL process</td>
<td>This is a status in the item list (when the Resource Sharing request doesn't have due date).</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.status.TECHNICAL.with_no_expected_date</td>
<td>Technical</td>
<td>This is a status in the item list.</td>
</tr>
<tr>
<td>c.uresolver.viewit.related_type_list.CONTAINS</td>
<td>Related Records</td>
<td>This is the label for the relation type Contains. This label appears with View It related records. See the Enabling the Display of Related Records in Primo section for more information.</td>
</tr>
<tr>
<td>c.uresolver.viewit.relatedTemplate</td>
<td>@TITLE (@RelationType)</td>
<td>This is shown in View It.</td>
</tr>
<tr>
<td>c.uresolver.missingProvider view full text</td>
<td>view full text</td>
<td>This is the link to the full text in View It.</td>
</tr>
</tbody>
</table>

### Configuring Related Records for Electronic Services

**Note**

This section applies only to Primo. For information on how to configure related records in Primo VE, see Configuring Related Record Services for Primo VE.
Related records indicate to the OpenURL link resolver that, when a user receives a certain record in the search results, another record should also be returned as related. Certain MARC fields, called linking entries (such as MARC fields 76X-78X), allow records to link to related bibliographic records and to differentiate their relationships to users. For a full list of MARC fields that are used as linking entries, see Modifying the Display Labels for Related Electronic Services. For additional information regarding physical resources, see Configuring Related Records for Physical Inventory.

For electronic services, the configuration of related records are useful for the following reasons:

- Articles sought by users 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 may list previous or newer versions in their holdings causing inconsistencies in the Community Zone. For example, the journal Civil Engineering Systems is now named Civil Engineering and Environmental Systems.

In the following example, View It displays the available services for the discovered record and the host record:

<table>
<thead>
<tr>
<th>Source: Civil engineering systems [0263-0257]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full text available at: Taylor &amp; Francis CRKN Science and Technology</td>
</tr>
</tbody>
</table>

**Services For Related Titles**

- Civil engineering and environmental systems (Precedes)
- Full text available at: CCC Get It Now Taylor and Francis

**Additional services**

- Search for this on Amazon

**Related Records as Shown in View It**

A close relation indicates that the two records should be considered identically useful in the search results. If the record requested in the OpenURL has close relations (MARC 773 and 774) with another record, electronic services for the related record are included in View It, with no indication that these services are 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. Other types of relations are considered remote and are listed under the Services for Related Titles section in View It.

**Note**

To configure close relations to appear in the same section as the related titles in View It, see the Display closely related record services option in Enabling the Display of Related Records in Primo.

**Modifying the Display Labels for Related Electronic Services**

The DISCOVERY_INTERFACE_LABELS code table page enables you to modify the following labels in View It:

- **Title** – The following code defines the label that displays above the list of related records in View It:
  
  c.uresolver.ServicesForRelatedTitles

- **Relationship** – The label that appears for each related entry in View It and Get It. To modify a label, see the relevant relationship in the table below.
See the illustrations below for examples of entries in the Discovery Interface Labels table (DISCOVERY_INTERFACE LABELS).

**Discovery Interface Labels Table - Services for Related Titles**

<table>
<thead>
<tr>
<th>Services For Related Title</th>
<th>Services For Related Title</th>
<th>Services For Related Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>410</td>
<td>Replace</td>
<td>Replace</td>
</tr>
<tr>
<td>411</td>
<td>Replace By</td>
<td>Replace By</td>
</tr>
<tr>
<td>454</td>
<td>Replace</td>
<td>Replace</td>
</tr>
</tbody>
</table>

**Discovery Interface Labels Table - Additional Form**

The following table presents 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 View It. For information on modifying labels, see Configuring Service Labels in the Discovery Interface.

**Note**

The labels and information that appear in the Primo’s Details section is determined by the normalization rules that are defined in Primo.

<table>
<thead>
<tr>
<th>Related Record Types</th>
<th>MARC Field</th>
<th>UNIMARC Field</th>
<th>Location in Primo</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main series entry</td>
<td>760</td>
<td>410</td>
<td>View It: c.uresolver.viewit.related_type_list.MAIN_SERIES = Main Series</td>
</tr>
<tr>
<td></td>
<td>Indicators 0#</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>$w, $x</td>
<td>$1 and starts with 001</td>
<td></td>
</tr>
<tr>
<td>Subseries entry</td>
<td>762</td>
<td>411</td>
<td>View It: c.uresolver.viewit.related_type_list.SUBSERIES = Subseries</td>
</tr>
<tr>
<td></td>
<td>Indicators 0#</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>$w, $x</td>
<td>$1 and starts with 001</td>
<td></td>
</tr>
<tr>
<td>Original language</td>
<td>765</td>
<td>454</td>
<td>View It: c.uresolver.viewit.related_type_list.ORIGINAL_LANGUAGE = Original Language</td>
</tr>
<tr>
<td>entry</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Relation/Type</td>
<td>MARC Field</td>
<td>UNIMARC Field</td>
<td>Location in Primo</td>
</tr>
<tr>
<td>----------------------------</td>
<td>------------</td>
<td>---------------</td>
<td>----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Translation entry</td>
<td>0#</td>
<td>$1 and starts with 001</td>
<td>View It: c.uresolver.viewit.related_type_list.TRANSLATION = Translation</td>
</tr>
<tr>
<td>(remote)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supplement entry</td>
<td>0#</td>
<td>$1 and starts with 001</td>
<td>View It: c.uresolver.viewit.related_type_list.SUPPLEMENT = Supplement</td>
</tr>
<tr>
<td>(remote)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supplement parent entry</td>
<td>00</td>
<td>$1 and starts with 001</td>
<td>View It: c.uresolver.viewit.related_type_list.SUPPLEMENT_PARENT = Supplement Parent</td>
</tr>
<tr>
<td>(remote)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Host item entry</td>
<td>0#</td>
<td>$1 and starts with 001</td>
<td>View It and Get It: c.uresolver.viewit.related_type_list.PART_OF = Part Of</td>
</tr>
<tr>
<td>(close)</td>
<td></td>
<td></td>
<td>Details: Display/Is Part Of (defined in Primo normalization rules)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Note</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>For Primo VE, Get It does not display the type of relation after the title, and closely related items will always appear under the Locations for Related Titles section.</td>
</tr>
<tr>
<td>Constituent unit entry</td>
<td>0#</td>
<td>$1 and starts with 001</td>
<td>View It and Get It: c.uresolver.viewit.related_type_list.CONTAINS = Contains</td>
</tr>
<tr>
<td>(close)</td>
<td></td>
<td></td>
<td>Note</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>For Primo VE, Get It does not display the type of relation after the title, and closely related items will always appear under the Locations for Related Titles section.</td>
</tr>
<tr>
<td>Other edition entry</td>
<td>0#</td>
<td>$1 and starts with 001</td>
<td>View It: c.uresolver.viewit.related_type_list.OTHER_EDITION = Other Edition</td>
</tr>
<tr>
<td>(remote)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Relation/Type</td>
<td>MARC Field</td>
<td>UNIMARC Field</td>
<td>Location in Primo</td>
</tr>
<tr>
<td>---------------------------------------</td>
<td>------------</td>
<td>---------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>Additional physical form entry (remote)</td>
<td>776</td>
<td>452</td>
<td>View It: c.uresolver.viewit.related_type_list.ADDITIONAL_FORM = Additional form</td>
</tr>
<tr>
<td>Issued with entry (remote)</td>
<td>777</td>
<td>423</td>
<td>View It: c.uresolver.viewit.related_type_list.ISSUED_WITH = Issued With</td>
</tr>
<tr>
<td>Preceding entry (remote)</td>
<td>780</td>
<td>430, 431, 432, 433, 434, 435, 436, 437</td>
<td>View It: c.uresolver.viewit.related_type_list.PRECEDES = Precedes</td>
</tr>
<tr>
<td>Succeeding entry (remote)</td>
<td>785</td>
<td>440, 441, 442, 443, 444, 445, 446, 447</td>
<td>View It: c.uresolver.viewit.related_type_list.SUCCEEDS = Succeeds</td>
</tr>
<tr>
<td>Data source entry</td>
<td>786</td>
<td></td>
<td>View It: c.uresolver.viewit.related_type_list.CONTAINS = Contains</td>
</tr>
</tbody>
</table>

Indicators 0# $w, $x, $z $1 and starts with 001
<table>
<thead>
<tr>
<th>Relation/Type</th>
<th>MARC Field</th>
<th>UNIMARC Field</th>
<th>Location in Primo</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other relationship entry (remote)</td>
<td>$w, $x, $z</td>
<td>412 413 424 425 455 456 470 481 482 488</td>
<td>View It: c.uresolver.viewit.related_type_list.OTHER_RELATIONSHIP = Other Relationship</td>
</tr>
<tr>
<td>Indicators 0#</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>$w, $x, $z</td>
<td>$1 and starts with 001</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Series added entry-personal name</td>
<td>800</td>
<td></td>
<td>View It: c.uresolver.viewit.related_type_list.CONTAINS = Contains</td>
</tr>
<tr>
<td>$w, $x</td>
<td></td>
<td></td>
<td>Details: Display/Relation – Series: (defined in Primo normalization rules)</td>
</tr>
<tr>
<td>Series added entry-corporate name</td>
<td>810</td>
<td></td>
<td>View It: c.uresolver.viewit.related_type_list.CONTAINS = Contains</td>
</tr>
<tr>
<td>$w, $x</td>
<td></td>
<td></td>
<td>Details: Display/Relation – Series: (defined in Primo normalization rules)</td>
</tr>
<tr>
<td>Series added entry-meeting name</td>
<td>811</td>
<td></td>
<td>View It: c.uresolver.viewit.related_type_list.CONTAINS = Contains</td>
</tr>
<tr>
<td>$w, $x</td>
<td></td>
<td></td>
<td>Details: Display/Relation – Series: (defined in Primo normalization rules)</td>
</tr>
<tr>
<td>Series added entry-uniform title</td>
<td>830</td>
<td></td>
<td>View It: c.uresolver.viewit.related_type_list.CONTAINS = Contains</td>
</tr>
<tr>
<td>$w, $x</td>
<td></td>
<td></td>
<td>Details: Display/Relation – Series: (defined in Primo normalization rules)</td>
</tr>
<tr>
<td>Valid ISBN, ISSN, or other standard number (remote)</td>
<td>020 $a, $e</td>
<td>010 $a</td>
<td>View It: c.uresolver.viewit.related_type_list.REPLACED_BY = Replaced By</td>
</tr>
<tr>
<td>022 $a, $e</td>
<td>011 $a</td>
<td></td>
<td></td>
</tr>
<tr>
<td>024 $a</td>
<td>013 $a, 014 $a, 015 $a, 016 $a, 017 $a, 072 $a, 073 $a</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cancelled/invalid ISBN, ISSN, or other standard number (remote)</td>
<td>020 $z</td>
<td>010 $z</td>
<td>View It: c.uresolver.viewit.related_type_list.REPLACES = Replaces</td>
</tr>
<tr>
<td>022 $y, $z</td>
<td>011 $g, 011 $y, 011 $z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>024 $z</td>
<td>013 $z, 014 $z, 015 $z, 01 $z, 017 $z</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Relation/Type</td>
<td>MARC Field</td>
<td>UNIMARC Field</td>
<td>Location in Primo</td>
</tr>
<tr>
<td>---------------------------</td>
<td>------------</td>
<td>---------------</td>
<td>--------------------------------------------------------</td>
</tr>
<tr>
<td>Linking ISSN (remote)</td>
<td>072 $z, 073 $z</td>
<td></td>
<td>View It: c.uresolver.viewit.related_type_list.LINKS_TO = Links To</td>
</tr>
<tr>
<td>Linking ISSN (remote)</td>
<td>022 $l</td>
<td>011 $f</td>
<td></td>
</tr>
</tbody>
</table>

For more information about configuring related records, see [Discovery Interface Display Logic for Related Records](#).

---

**Enabling the Display of Related Records in Primo**

To configure related records, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

The Related Record Services Configuration page enables you to configure the electronic services and physical inventory for related titles that appear in the Primo.

**To enable related record services:**

1. Open the Related Record Services Configuration page ([Configuration Menu > Fulfillment > Discovery Interface Display Logic > Related Records](#)).

   ![Related Record Services Configuration Page](#)

2. For electronic inventory, refer to the following table to configure how related records display in View It. For more information, see [Configuring Related Records for Electronic Services](#) and [Modifying the Display Labels for Related Electronic Services](#).
### Related Record Services Configuration Options – View It Section

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable related record services</td>
<td>Select <strong>Yes</strong> if you want to display a record's related titles in View It. If enabled, the remaining fields allow you to restrict or modify the display of related titles for specific types of records.</td>
</tr>
<tr>
<td>Display related services if full text is available</td>
<td>Display services for related records if full text is available. Services for related records are not shown if there is a full-text service for the original record in the OpenURL.</td>
</tr>
<tr>
<td>Display related services for serials</td>
<td>Display related services for serials (which have a Journal material type).</td>
</tr>
<tr>
<td>Display related services for monographs</td>
<td>Include related services for monographs (which have a Book material type).</td>
</tr>
<tr>
<td>Deduplicate electronic collection services</td>
<td>Use deduplication of electronic collection services for remote related services. This causes Primo to display only one service if related records are associated with the same electronic collection.</td>
</tr>
<tr>
<td>Enable direct link for related services</td>
<td>Turn on the direct-linking feature.</td>
</tr>
<tr>
<td>Disable Related Record Services for Digital</td>
<td>Disable the display of related records for digital records.</td>
</tr>
</tbody>
</table>
| Display closely related record services | How closely related services (which are defined with MARC 773 or 774 fields in the bibliographic record) should appear in View It:  
  ◦ **As part of the original services** – Closely related services are placed in the list of regular services in View It with no indication that these services are for related titles.  
  ◦ **Separately from the original record services** – Closely related services are placed under the Services for Related Titles section in View It. |

3. For physical inventory, refer to the following table to configure how related records display in Get It. For additional information, see [Configuring Related Records for Physical Inventory](#).

### Related Record Services Configuration Options – Get It Section

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable related record services</td>
<td>Select <strong>Yes</strong> if you want to display a record's related titles in Get It. If enabled, the remaining fields allow you to restrict or modify the display of related titles for specific types of records.</td>
</tr>
<tr>
<td>Display related holdings for</td>
<td>Select this option to display the related holdings records for serials.</td>
</tr>
<tr>
<td>Parameter</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>serials</td>
<td></td>
</tr>
<tr>
<td>Display related holdings for monographs</td>
<td>Select this option to display the related holdings records for monographs. Note that for monographs, related inventory appearing in Get It is considered when fulfilling title-level requests placed by the patron. If you disable the display of related records for monographs, the related records’ inventory that isn’t displayed is not considered when fulfilling title-level requests.</td>
</tr>
</tbody>
</table>
| Display closely related records holdings | Select one of the following options to indicate how you want the closely related records (which are defined with MARC 773 or 774 fields in the bibliographic record) to appear in Get It:  
  - As part of the original holdings – Closely related records are placed in the list with the original holdings in Get It with an indication that these are related holdings, including title and relation type.  
  - Separately from the original record holdings – Closely related records are placed under the Locations for Related Titles section in Get It. See c.uresolver.getit2.display_related_holding_separately_from_original_record in the table above for more information. |

**Note**
For Primo VE, related records are displayed separately, regardless of this setting.

4. Select **Save**.

### Configuring Direct Linking

To configure direct linking, you must have one of the following roles:

- Fulfillment Administrator
- General System Administrator

Direct linking configuration enables Alma to skip the Services page and menu and link immediately to an electronic service (such as full text) when coming from an OpenURL-enabled source. If the OpenURL context object contains multiple electronic services, the OpenURL link resolver displays the first electronic service in the list (if the Enable direct linking and Enable direct linking when multiple services are available options are enabled). You can configure the order of the services in the Online Services Order page (see Configuring Online Services Order).

You configure direct linking on the Direct Linking Configuration page (Configuration Menu > Fulfillment > Discovery Interface Display Logic > Direct Linking). On this page you can enable direct linking and specify situations in which direct linking is overridden.
To configure direct linking:

1. On the Direct Linking Configuration page (Configuration Menu > Fulfillment > Discovery Interface Display Logic > Direct Linking), select Yes from the Enable direct linking parameter to enable direct linking.

   Selecting No indicates that the electronic service is not accessed directly from the search results in Primo, and users must select the service from a list provided by your link resolver (SFX or Alma).

   Selecting Yes enables direct linking and the other configuration parameters.

2. Configure the other parameters which allow you to control direct linking based on the record. Refer to the table below for an explanation of your options.

### Direct Linking Configuration Options

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable direct linking when multiple services are available</td>
<td>Enable direct linking even when more than one electronic service is available for the record.</td>
</tr>
<tr>
<td>Disable direct linking when Open Access service is available</td>
<td>Select this option to disable direct linking when an Open Access Service is available. See Open Access for more information.</td>
</tr>
<tr>
<td>Disable direct link when additional information is available</td>
<td>Disable direct linking even when additional information is available for the record.</td>
</tr>
</tbody>
</table>

**Note**

You can only configure direct linking at the institution level. Select the required institution from the Configuring filter on the Fulfillment Configuration page.
**Parameter** | **Description**
---|---
available: | - Authentication note
- Public Note

Disable direct linking when a record's services contain an authentication note.

**Public note**

Disable direct linking when a record's services contain a public note.

Disable direct linking for electronic collections

Select this option to disable direct linking when the first service (result) in the View It service list is a match between the search in the discovery system and the electronic collection's bib record. The electronic collection's level URL will appear first in the View It service list in two cases:

- It is the only service available in the View It service list (single result in the View It).
- The electronic collection service result is configured to appear first in the View It service results list via the **Online Services Order** and **Display Logic Rules** configurations. See Configuring Online Services Order and Configuring Display Logic Rules for more information.

Disable direct linking for journals

When **Yes** is selected for **Enable direct linking** and **Disable direct linking for journals** is selected, direct linking is disabled under the following conditions:

- When the **Electronic material type** for a portfolio is set to **Journal**.

**Electronic Material Type Set to Journal**

**Note**

Any other electronic material type setting will not be considered and treated like a journal.

- When Alma determines from the OpenURL that there is no indication of article-level attributes like the following:
  - Page(s) indication (rft.spages, rft.epage, rft.pages)
  - Doi (rft_id" source1="(info:doi/\.*)(doi:\.*)")
  - Pmid (rft_id" source1="(info:pmid/\.*)(pmid:\.*)")
    For example:
    …&rft_id=pmid:28274348&…
  - Oaid (rft_id" source1="(info:oai/\.*)(oai:arXiv:\.*)")

**Note**

The setting for the **Linking level** parameter in the Electronic Service Editor is ignored, even when it is set to **Journal**.

Related to disabling direct linking to journals, the following OpenURL attributes are supported:

- **Force_direct=true** – This overrides any Alma configuration regarding direct linking and forces using...
### Configuring General Electronic Services

To configure general electronic services, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

**Note**

This section applies only to Primo. For information on how to configure general electronic services in Primo VE, see Configuring General Electronic Services for Primo VE.

In addition to services found in your own collection (such as full text, requests, and so forth), Alma enables you to define general HTTP services (such as searches in ProQuest dissertations and Amazon.com, Ask a Librarian, and so forth) to present to patrons in Primo. To have these services appear in Leganto, see Enabling General Electronic Services in Leganto.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
</table>
| direct linking                                | This overrides any Alma configuration regarding direct linking and does not force using direct linking.  
| ◦ Force_direct=false                          | This is treated like Force_direct=true.                                       |
| ◦ sfx.directlink=force                        | This is treated like Force_direct=false.                                      |
| ◦ “disable_directlink=true&sfx.directlink=off”| This is treated like Force_direct=false.                                      |

**Note**

If both an enable direct linking and a disable direct linking attribute are stated in an OpenURL, the attribute related to disabling direct linking takes priority.

---

3. Select **Save**.

---

Electronic Service Example (Primo View It)

- Open source in a new window
- Send to

Full text available at: EBSCOhost Business Source Complete
Available from 2004 until 2004

- **Additional services**
  - Amazon
  - Search for your book
In order to create a general electronic service, you must be familiar with the syntax of the service’s URL, which includes any parameters that are required to query or access specific information from the service. The service’s URL along with OpenURL context object attributes returned from Alma’s link resolver are used to define the URL template, which Alma uses to create the service link that appears in View It and/or Get It.

In addition, you can configure the following display settings for general electronic services:

- Specify service order – see Configuring General Electronic Services Order
- Define display logic rules – see Configuring Display Logic Rules

You can also share your general electronic services in the Community Zone, and use general electronic services defined by other institutions. See Sharing General Electronic Services in the Community Zone.

To configure general electronic services:

1. Open the General Electronic Services Configuration page (Configuration Menu > Fulfillment > Discovery Interface Display Logic > General Electronic Services). In addition to the columns that are visible on the General Electronic Services list, the Item Level column may be added to the view in the view configuration.

   ![General Electronic Services List](image)

2. Select Add Service. The Add Service dialog box opens.

   ![Add Service Dialog Box](image)

3. Enter the following service information:

   - **Service Code** – The internal code for the service.
   - **Service Name** – The internal name used for the service.
Service Description – The description of the service.

Public Name – The label for the link that displays in View It and/or Get It.

Public Note – The note or description of the service that displays below the link in View It and/or Get It.

Is this a Document Delivery/ILL Service – (Applies only to Alma-Summon and Primo VE environments.) Choose one of the following options: Yes indicates that this service provides access to the resource and will appear in the specified display location. No indicates that the links to the general electronic service will display in the Links section.

Display Location – Specify the areas in Primo in which the link displays. The following options are valid: None, Getit & How To Getit, Viewit & How To Getit, Getit, viewit & How To Getit, and How To Getit only.

Note

The display of general electronic services is based on the service's availability rules that are defined with the Service Availability Rules tab, which appears while editing a general electronic service. For more details, see step 5. See Configuring Display Logic Rules if you want to hide the general electronic service based on additional criteria (such as the existence of another type of service or the type of user).

URL Template – The URL where the patron is redirected when the external service link is selected.

The URL substitutes OpenURL fields that are enclosed in brackets ( "{" and "}") with the relevant values. For example, the referring URL's ISBN is substituted into a URL containing: ...&isbn={rft.isbn}&...

For example, the URL for an Amazon search for a specific ISBN:

http://www.amazon.com/s/ref=nb_sb_ss_c_0_12?url=search-alias%3Dstripbooks&field-keywords={rft.isbn}

When connecting to a resource sharing broker, ensure that this field contains an attribute corresponding to the broker in use. For example, when using the OCLC broker:

http://xxx.worldcat.org/oclc/{rft.oclcnum}

ILLiad - Books/Book Items (based on your institution’s base URL). For example:

http://libill.XXX.edu/illiad/
illiad.dll?Action=10&Form=30&rft.genre={rft.genre}&rft.title={rft.btitle}&rft.stitle={rft.stitle}&rft.atitle={rft.atitle}&...&pub={rft.pub}&rft.publisher={rft.publisher}&rft.place={rft.place}&rft.doi={rft.doi}&rfe_dat={rft.oclcnum}&rfr_id={rfr_id}

ILLiad - Articles/Journals (based on your institution’s base URL). For example:

http://libill.XXX.edu/illiad/
illiad.dll?Action=10&Form=30&rft.genre={rft.genre}&rft.title={rft.title}&rft.stitle={rft.stitle}&rft.atitle={rft.atitle}&rft.pubyear={rft.pubyear}&rft.publisher={rft.publisher}&rft.place={rft.place}&rft.doi={rft.doi}&rfe_dat={rft.oclcnum}&rfr_id={rfr_id}

ProQuest - Dissertation Service. For example:

http://gateway.proquest.com/ openurl?res_dat=xri%3Apqm&title={rft.btitle}&rft_val_fmt=info%3Aofi%2Ffmt%3Akev%3Amtx%3Atext%3Aen
The following values can be specified in the URL Template parameter between the curly brackets used for normalizing the ISBN, ISSN, eISBN, or eISSN:

- **rft.normalized_isbn**
  
  This normalization removes the text after digits and the hyphen (-) and converts ISBN 10 to ISBN 13.

- **rft.normalized_issn**
  
  This normalization removes the text after digits and changes text to lower case.

- **rft.normalized_Eisbn**
  
  This normalization removes the text after digits and the hyphen (-) and converts ISBN 10 to ISBN 13.

- **rft.normalized_Eissn**
  
  This normalization removes the text after digits and changes text to lower case.

For more information regarding OpenURL, refer to the following:

- [Commonly Used OpenURL Attributes for the URL Template](#)
- [http://en.wikipedia.org/wiki/OpenURL](#)
- Specific vendor web sites for OpenURL details

- **Item Level** - Select **yes** to show the link next to each item that matches the input rules. Select **no** to show the link at the holding level. This field is only active when the **Display Location** field is **Getit** or **None**.

---

**Note**

To prevent potential performance issues, the Item level **General Electronic Services** cannot be used for the **If Exists** portion of Display Logic Rules.

---

When the General Electronic Service is added as an item level service, the URL template may be configured to make use of the following Holdings and item level information:

<table>
<thead>
<tr>
<th>Holdings/Item Element</th>
<th>Name of Place Holder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Library (Code)</td>
<td>Library</td>
</tr>
<tr>
<td>Current Location (Code)</td>
<td>Location</td>
</tr>
<tr>
<td>Current Call Number</td>
<td>Call_Number</td>
</tr>
<tr>
<td>Barcode</td>
<td>Barcode</td>
</tr>
<tr>
<td>Material Type (Code)</td>
<td>Material_Type</td>
</tr>
<tr>
<td>Current Item Policy (Code)</td>
<td>Item_Policy</td>
</tr>
<tr>
<td>MMS ID</td>
<td>BIB MMS_ID</td>
</tr>
<tr>
<td>Process Type (Code)</td>
<td>Process_Type</td>
</tr>
</tbody>
</table>
In addition, it is possible to add fields from the Holdings record to the URL template. The placeholder syntax is \texttt{HOL\_\{field\}\_\{indicators\}\_\{subfields\}}. The use of indicators is optional. For example:

- \texttt{HOL\_506\_ab} - Alma will extract subfields a and subfield b from 506 field. Each subfield will be delimited from the next one with a space. The indicators are not taken into account.
- \texttt{HOL\_506\_12\_df} - Alma will extract subfields d and subfield f from 506 field only when indicators 1 and 2 exists. Each subfield will be delimited from the next one with a space.
- \texttt{HOL\_506\_1\#\_g} - In this scenario, Alma will extract subfields g from 506 field only when the first indicator value is 1 with no dependency on the second indicator.

A sample URL template may be: \texttt{<baseURL>?LIB=\{library\}&BARCODE=\{barcode\}&FIELD1=\{HOL\_506\_ab\}}.

4. Select \textbf{Add and Close}. The new service appears on the General Electronic Service page with the following row actions: \textbf{Remove} and \textbf{Edit}.

5. Edit the new row to configure additional service details.

The Service Details page appears.

6. To display this service to signed-in users only, select \textbf{No} in the \textbf{Enable without login} field.

7. To display this service based on the availability of the physical resource in the institutional repository, select one of the following options for \textbf{Disable Service}:

\textbf{Note}

When a guest user or a user without a configured campus performs any of the campus-level disabling activities, Alma disables/hides the service based on a self-ownership check done at the institution level.
Never – The service is never disabled.

When resource is owned by the campus – The service is disabled when physical items for the resource are owned by the campus.

When resource is owned by the campus and available – The service is disabled when physical items for the resource are owned by the campus and are available (that is, they are not involved in a process).

When resource is owned by the institution – The service is disabled when there are physical items for the resource that are owned by the institution.

When resource is owned by the institution and available – The service is disabled when there are physical items for the resource that are owned by the institution, are in place, and are in an open location. Note that if a physical location is set to Unavailable (see Adding a Physical Location) and this option is selected, the service is enabled. You may want to use this option when items in a certain location (such as a reading room) cannot be requested. Setting this location to Unavailable will enable the display of the service.

8. Select the Service Availability Rules tab.

The Service Availability Rules tab displays the rules that the system uses to determine whether a service should appear for the user. Each service has a default rule that is applied when none of the other rules apply. By default, the system does not display the service (IsDisplay=False). You can edit the default rule and add rules as needed.

9. Add rules regarding the OpenURL context object attributes (which may be returned by Alma’s link resolver during the user’s search) to ensure that Alma has the necessary information to display the service.

Note

- The available attributes are standard OpenURL attributes. For more information, see Commonly Used OpenURL Attributes for the URL Template.
- The following item level attributes may be used when item level services are configured:
  - material_type
  - item_policy - values are populated from the institution’s Item Policy table. See Configuring Item Policies.
  - process_type
  - base_status - values are Item not in place and Item in place.
- Adding parameters within a rule will cause the parameters to have an AND relationship with each other,
meaning that all values must be true before the rule is considered true. For OR conditions, where only one of values must be true, parameters should be entered separately in a new rule.

- If multiple rules evaluate to true, the output parameter will be applied based on the first rule that is true.

1. To add a new rule, select **Add Rule**. The Edit Rule page opens.

2. In the **Edit Rule** section, enter the rule name (required) and description (optional).

3. In the **Input Parameters** section, select **Add Parameter**. The Add Parameter dialog box opens.

4. Enter the following fields:
   - **Name** – The name of the attribute in the OpenURL context object. For more information about these attributes, see Commonly Used OpenURL Attributes for the URL Template.
- **Operator** – The comparison operator to use with this context object attribute.
- **Value** – An accepted value for this parameter. To match multiple values, create a separate rule for each value. Note that not all operators require a value.

5. Select **Add Parameter**. The parameter is added to the input parameter list.

6. In the **Output Parameters** section, set **IsDisplay** to **true**.

7. Select **Save**. The Service Availability Rules page displays the new rule.

10. Select **Save**. The General Electronic Services page displays the new service.

In a collaborative network, you can create general electronic services in the Network Zone and then distribute them to member institutions. The member institutions have view permission to the distributed records but are not able to edit or delete them. When the Network Zone general electronic service has been distributed, the local list will show either the distributed records only or both the distributed records and the previous local general electronic service records, depending on the configuration in the customer parameter, **network_ges_distribution_members_behavior**.

For more information, see [Configuring Fulfillment Information in the Network Zone](#).

### Commonly Used OpenURL Attributes for the URL Template

The OpenURL attributes returned from Alma’s link resolver are grouped by the following general categories:

<table>
<thead>
<tr>
<th>Category</th>
<th>Prefix</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requester</td>
<td>req.</td>
<td>Information about the requesting entity, that is, the patron. Not used when creating service availability rules for general electronic services.</td>
</tr>
<tr>
<td>ReferringEntity</td>
<td>rfe.</td>
<td>Information about the referring entity, i.e. Primo. Not used when creating service availability rules for general electronic services.</td>
</tr>
<tr>
<td>Referent</td>
<td>rft.</td>
<td>Information about the requested item.</td>
</tr>
<tr>
<td>ServiceType</td>
<td>svc.</td>
<td>Whether a particular format of the Referent is available: &quot;yes&quot; or &quot;no&quot;. For example, whether the requested target is available as an abstract or as full text. Multiple service types may be available.</td>
</tr>
<tr>
<td>Other</td>
<td>various</td>
<td>Other returned values are unused, unless noted below.</td>
</tr>
</tbody>
</table>

The following are commonly returned attributes that can be used to create service availability rules:

<table>
<thead>
<tr>
<th>Attribute</th>
<th>PNX</th>
<th>MARC 21 Fields</th>
<th>Description</th>
</tr>
</thead>
</table>

Ex Libris, a ProQuest Company
<table>
<thead>
<tr>
<th></th>
<th>Mapping</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>req_id</td>
<td>The PDS handle (see <a href="#"><em>Identify Patrons to Provide Relevant Services</em></a>)</td>
<td></td>
</tr>
<tr>
<td>rft.advisor</td>
<td>Advisor, for a dissertation</td>
<td></td>
</tr>
<tr>
<td>rft.applcc</td>
<td>Application country code in ISO two-character format, for a patent. The country in which the patent application was main.</td>
<td></td>
</tr>
<tr>
<td>rft.appldate</td>
<td>Date of application, for a patent</td>
<td></td>
</tr>
<tr>
<td>rft.applyear</td>
<td>Year of application, for a patent</td>
<td></td>
</tr>
<tr>
<td>rft.artnum</td>
<td>Article number. Assigned by the publisher. A URL may be the only usable ID for an online article.</td>
<td></td>
</tr>
<tr>
<td>rft.assignee</td>
<td>Assignee, for a patent: &quot;Smith, John J.&quot;, &quot;IBM&quot;</td>
<td></td>
</tr>
<tr>
<td>rft.atitle</td>
<td>Article or chapter title</td>
<td></td>
</tr>
<tr>
<td>rft.au</td>
<td>One author's full name: &quot;Smith, Fred James Jr.&quot;</td>
<td></td>
</tr>
<tr>
<td>rft.auinit</td>
<td>First author's first and middle initials</td>
<td></td>
</tr>
<tr>
<td>rft.auinit1</td>
<td>First author's first initial</td>
<td></td>
</tr>
<tr>
<td>rft.auinitm</td>
<td>First author's middle initial</td>
<td></td>
</tr>
<tr>
<td>rft.aulf</td>
<td>First author's last name: &quot;Smith&quot; May have spaces and punctuation.</td>
<td></td>
</tr>
<tr>
<td>rft.bici</td>
<td>Book Item and Component Identifier (BICI code)</td>
<td></td>
</tr>
<tr>
<td>rft.btitle</td>
<td>Book title, if the LDR material_type = BK. See rft.jtitle.</td>
<td></td>
</tr>
<tr>
<td>rft.cc</td>
<td>Publication country code, in ISO two-character format: &quot;US&quot;. See co.</td>
<td></td>
</tr>
<tr>
<td>rft.chron</td>
<td>Enumeration or chronology not in standard format: &quot;1st quarter&quot;. Where possible, use date. See ssn and quarter.</td>
<td></td>
</tr>
<tr>
<td>rft.co</td>
<td>Publication country: &quot;United States&quot;. See cc.</td>
<td></td>
</tr>
<tr>
<td>rft.coden</td>
<td>CODEN (alphanumeric code)</td>
<td></td>
</tr>
<tr>
<td>rft.date</td>
<td>Publication date. For a patent, this is the date that the patent was issued. Format is YYYY, YYYY-MM, or YYYY-MM-DD.</td>
<td></td>
</tr>
<tr>
<td>rft.day</td>
<td>Publication day</td>
<td></td>
</tr>
<tr>
<td>rft.dcContributor</td>
<td>Dublin Core contributor: person, organization, or service</td>
<td></td>
</tr>
<tr>
<td>rft.dcCreator</td>
<td>Dublin Core creator: person, organization, or service</td>
<td></td>
</tr>
<tr>
<td>rft.dcDescription</td>
<td>Dublin Core description: abstract, table of contents, graphical representation, or free text</td>
<td></td>
</tr>
<tr>
<td>rft.dcFormat</td>
<td>Dublin Core format: File format, physical medium, or dimensions, such as MIME type</td>
<td></td>
</tr>
<tr>
<td>rft.dcIdentifier</td>
<td>Dublin Core identifier: Unambiguous resource identifier</td>
<td></td>
</tr>
<tr>
<td>rft.dcLanguage</td>
<td>Dublin Core language: Resource language</td>
<td></td>
</tr>
<tr>
<td>rft.dcPublisher</td>
<td>Dublin Core publisher: person, organization, or service</td>
<td></td>
</tr>
<tr>
<td>rft.dcRelation</td>
<td>Dublin Core relation: A related resource</td>
<td></td>
</tr>
<tr>
<td>rft.dcRights</td>
<td>Dublin Core rights: Rights information</td>
<td></td>
</tr>
<tr>
<td>rft.dcSource</td>
<td>Dublin Core source: A related resource from which this resource was taken</td>
<td></td>
</tr>
<tr>
<td>rft.dcSubject</td>
<td>Dublin Core subject: keywords and classification codes</td>
<td></td>
</tr>
<tr>
<td>rft.dcTitle</td>
<td>Dublin Core title: Resource title</td>
<td></td>
</tr>
<tr>
<td>rft.dcType</td>
<td>Dublin Core type: nature and genre, such as described by DCMITYPE. For format, see dcFormat.</td>
<td></td>
</tr>
<tr>
<td>rft.degree</td>
<td>Degree issued, for a dissertation</td>
<td></td>
</tr>
<tr>
<td>rft.doi</td>
<td>DOI (digital object identifier) field</td>
<td></td>
</tr>
<tr>
<td>rft.edition</td>
<td>Book edition, typically a phrase, with or without numbers: &quot;First edition&quot;, &quot;4th ed.&quot;.</td>
<td></td>
</tr>
<tr>
<td>rft.eisbn</td>
<td>International Standard Book Number for electronic version. May be multiple ISBN, separated by commas. May contain a hyphen. May or may not be distinct from rft.isbn.</td>
<td></td>
</tr>
<tr>
<td>rft.issn</td>
<td>International Standard Serial Number for electronic version. May be multiple ISSN, separated by commas. May contain a hyphen. May or may not be distinct from rft.issn.</td>
<td></td>
</tr>
<tr>
<td>rft.epage</td>
<td>End page of article/chapter within volume/issue.</td>
<td></td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>--------------</td>
<td>-----------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>rft.format</td>
<td>MIME type of the format</td>
<td></td>
</tr>
<tr>
<td>rft.genre</td>
<td>One of:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• article: document published in a journal</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• book: complete in a single part, often identified by an ISBN</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• bookitem: section of a book, usually with a title or number</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• conference: record of a conference (one or more conference papers)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• issue: single issue</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• preprint: paper or report published in print or electronically</td>
<td></td>
</tr>
<tr>
<td></td>
<td>prior to publication in journal or serial</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• proceeding: conference presentation published in a journal or serial</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• report: report or technical report published by an organization, agency,</td>
<td></td>
</tr>
<tr>
<td></td>
<td>or governmental body</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• unknown</td>
<td></td>
</tr>
<tr>
<td>rft.inst</td>
<td>Issuing institution, for a dissertation</td>
<td></td>
</tr>
<tr>
<td>rft.inventor</td>
<td>Inventor’s full name: &quot;Smith, John J.&quot;. For a patent.</td>
<td></td>
</tr>
<tr>
<td>rft.invfirst</td>
<td>Inventor’s given names: &quot;John J.&quot;. For a patent.</td>
<td></td>
</tr>
<tr>
<td>rft.invlast</td>
<td>Inventor’s last name: &quot;Smith&quot;. For a patent.</td>
<td></td>
</tr>
<tr>
<td>rft.isbn</td>
<td>020 a if there is an 020 e; otherwise 776 z if the record is not physical</td>
<td></td>
</tr>
<tr>
<td></td>
<td>020 a if there is no 020 e and the record is physical</td>
<td></td>
</tr>
<tr>
<td></td>
<td>May contain hyphens</td>
<td></td>
</tr>
<tr>
<td>rft.issn</td>
<td>022 a if there is no 022 e and the record is physical; otherwise 022 a if</td>
<td></td>
</tr>
<tr>
<td></td>
<td>there is an 022 e or 776 x if the record is not physical</td>
<td></td>
</tr>
<tr>
<td></td>
<td>International Standard Serial Number. May contain a hyphen.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>ISSN for a book may be associated with the series.</td>
<td></td>
</tr>
<tr>
<td>rft.jtitle</td>
<td>For the LDR positions, see Fields that Identify the Bibliographic Material</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Type.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Full journal title, if the LDR material_type = CR. See rft.btitle. For</td>
<td></td>
</tr>
<tr>
<td></td>
<td>example, &quot;Journal of the American Medical Association&quot;. For short</td>
<td></td>
</tr>
<tr>
<td></td>
<td>title, use stitle.</td>
<td></td>
</tr>
<tr>
<td>rft.kind</td>
<td>Patent kind code, for a patent: &quot;AU A1&quot;. Kind codes are meaningful within</td>
<td></td>
</tr>
<tr>
<td></td>
<td>the country of origin</td>
<td></td>
</tr>
<tr>
<td>rft.month</td>
<td>Publication month</td>
<td></td>
</tr>
<tr>
<td>rft.number</td>
<td>Application number, for a patent</td>
<td></td>
</tr>
<tr>
<td>rft.object_type</td>
<td>For the LDR positions, see Fields that Identify the Bibliographic Material</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Type.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The LDR material_type. The default is BOOK.</td>
<td></td>
</tr>
<tr>
<td>rft.oclcnum</td>
<td>addata/occid</td>
<td>035 a,z</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>rft.pages</td>
<td>addata/pages</td>
<td></td>
</tr>
<tr>
<td>rft.part</td>
<td>addata/part</td>
<td></td>
</tr>
<tr>
<td>rft.place</td>
<td>addata/cop</td>
<td>260 a or 264 a</td>
</tr>
<tr>
<td>rft.prioritydate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>rft.pub</td>
<td>addata/pub</td>
<td>502 a,c or 260 b or 264 b</td>
</tr>
<tr>
<td>rft.pubdate</td>
<td></td>
<td>260 c or 260 g or 264 c or 362 a or 008(date1)</td>
</tr>
<tr>
<td>rft.publisher</td>
<td></td>
<td>502 a,c or 260 b or 264 b</td>
</tr>
<tr>
<td>rft.pubyear</td>
<td></td>
<td></td>
</tr>
<tr>
<td>rft.quarter</td>
<td>addata/quarter</td>
<td></td>
</tr>
<tr>
<td>rft.series</td>
<td>addata/seriestitle</td>
<td></td>
</tr>
<tr>
<td>rft.sici</td>
<td>addata/sici</td>
<td></td>
</tr>
<tr>
<td>rft.spage</td>
<td>addata/spage</td>
<td></td>
</tr>
<tr>
<td>rft.ssn</td>
<td>addata/ssn</td>
<td></td>
</tr>
<tr>
<td>rft.title</td>
<td></td>
<td>245 a,b</td>
</tr>
<tr>
<td>rft.tpages</td>
<td></td>
<td></td>
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<tr>
<td>rft.volume</td>
<td>addata/volume</td>
<td></td>
</tr>
<tr>
<td>svc.abstract</td>
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<tr>
<td>svc.any</td>
<td></td>
<td></td>
</tr>
<tr>
<td>svc.citation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>svc.fulltext</td>
<td>Full text</td>
<td></td>
</tr>
<tr>
<td>--------------</td>
<td>-----------</td>
<td></td>
</tr>
<tr>
<td>svc.holdings</td>
<td>Holdings information. This field is not used to hide services based on whether the record has holdings. If it is included in the OpenURL, it will be saved in the Context Object for use in the GES.</td>
<td></td>
</tr>
<tr>
<td>svc.ill</td>
<td>Interlibrary loan</td>
<td></td>
</tr>
</tbody>
</table>

---

### Sharing General Electronic Services in the Community Zone

To share and copy shared General Electronic Services, you must have one of the following roles:

- Fulfillment Administrator
- General System Administrator

Institutions spend many hours creating general electronic services. In order for these institutions to save time and effort, librarians can contribute their general electronic services to the Community Zone and copy and use the general electronic services that other institutions contributed to the Community Zone. Once the general electronic service has been copied to the institution, the institution can make changes to it in order to customize it for its needs.

When a general electronic service is contributed, all its related rules are contributed as well.


The general electronic services set by the network institution also appear in the Institution tab. To distribute the general electronic service to consortia members, the Distribute Fulfillment Network Configuration job is used (see Configuring Fulfillment Information in the Network Zone). This is since these general electronic services are managed by the network institution and therefore, cannot be edited or contributed by the member institution.

### To contribute general electronic services to the Community Zone:

1. From the row actions, select **Contribute** for a general electronic service on the Institution tab of the General Electronic Services page (Alma Configuration > Fulfillment > Discovery Interface Display Logic > General Electronic Services).

A confirmation message appears.
2. You can optionally change the Service Code and Service Name.

3. It is recommended that you change the Description to include detailed information for institutions that will copy the GES.

4. You can optionally enter or change the name and email address for the Contact person.

5. Select Confirm. The service appears in the Community tab and can be copied by any institution.

In case the general electronic service has been already contributed by the institution to the CZ, you may also edit and re-contribute an edited general electronic service. The latest general electronic service overwrites the previous general electronic service. This action has no effect on local copies of the general electronic services used by other institutions.

**To view contributed general electronic services and/or copy a contributed services:**

1. Open the Community tab on the General Electronic Services page (Alma Configuration > Fulfillment > Discovery Interface Display Logic > General Electronic Services).

   To view more information about the general electronic services, from the row actions, select View. The profile details appear.

2. Select Copy in the row actions list of the general electronic service. The general electronic service is copied to your institution and the new general electronic service is opened for editing. The general electronic service is copied and its status is inactive by default.

3. Edit the general electronic service details to match your requirements.

4. When you are done, select Save.

5. Select the Institution tab to view the general electronic service that you copied.

**To remove (unshare) a general electronic service you contributed from the Community Zone:**

- Select Delete in the row actions list of the general electronic service and select Confirm in the confirmation dialog box.

The general electronic service is no longer available to other institutions. However, it is not deleted; you can continue using it in the Institution tab. Also, if another institution already copied this general electronic service, the deletion of your general electronic service has no effect on their local copy.

---

**Configuring Viewer Services**

To configure viewer services, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator
You can configure the digital file viewers that may appear after selecting to view a digital file (after selecting View It on the search results page; see Using the OpenURL Link Resolver Electronic Services Page). For more information, see the Developer's Network documentation at https://developers.exlibrisgroup.com/alma/integrations/digital/almadigital/access. Also see the parameter delivery_service_allowed_origins in Configuring Other Settings.

![Viewer Services](image)

**Viewer Services**

There are three viewers available in Alma out-of-the-box: the Internet Archive Book reader, the Alma Viewer, and the Universal Viewer. The Alma Viewer is Alma’s default viewer. It uses the browser’s HTML5 players and so is capable of displaying any format that is natively supported by the different browsers (such as various video, audio, and image formats). For other formats it provides a download option.

The Universal Viewer is based on IIIF – the International Image Interoperability Framework, and it provides advanced capabilities for viewing high-resolution images for the tiff, jpeg, and jpeg2000 formats, such as rotate and zoom-in/zoom-out actions.

The Internet Archive Book reader is also based on IIIF and provides capabilities for viewing images. It allows you to perform text searches in digital files when a full text file is uploaded to Alma.

You can enable, disable, edit, add and remove digital viewers on the Viewer Services page (Configuration Menu > Fulfillment > Discovery Interface Display Logic > Viewer Services).

Drag the services and rearrange their order to change the order in which they appear on the View It tab.

To add a digital viewer, select **Add Service**.

![Add Service](image)

**Add Digital Viewer**

To configure the service availability rules for a viewer:

1. Select **Edit** for a viewer and select the **Service Availability Rules** tab.
2. Select **Add Rule**. The following appears:

![Add Service Availability Rule](image)

3. Enter a name and description.

4. In the Input Parameters section, select **Add Parameter**. The following appears:
5. Select a name, operator, and value, and select Add parameter.

6. In the Output Parameters section, select True or False from the Display drop-down list to determine if the viewer is displayed when the rule is true or when it is false.

7. Select Save.

The rule is added to the list of service availability rules.

To configure the Alma Viewer:

Select Edit for the Alma Viewer and select the Service Details tab.

The following configuration options are available:
• Hide Repeated Labels – display repeated labels in a list under the label.

**Note**

If you enter a delimiter in the Delimiter for Grouping Repeated Delivery Metadata field located at Configuration > Fulfillment > Discovery Interface Display Logic > Other Settings, this field does not appear. To have it appear, you must remove the delimiter. For more information, see Configuring Other Settings.

• Use New Viewer – display digital resources using the new Alma Viewer.

**Note**

The new Alma Viewer is not currently supported for Internet Explorer and Edge browsers. Support for these browsers will be added in July.

• Hide Fulltext – Hide the display of full text in the new Alma viewer.

**To configure the Universal Viewer to display the Download Original File icon:**

1. Select **Edit** for the Universal Viewer and select the **Service Details** tab.

   ![Universal Viewer Service Details](image)

   **Universal Viewer Service Details**

2. Select the **Display Original Image Download Link** to display the Download Original File icon in the Universal Viewer.

**To customize the Alma Viewer using Primo Studio:**

1. Select **Edit** for the Alma Viewer and select the **Customization** tab.

2. Select a Primo View and a Representation ID to use as an example when configuring the viewer.

3. Select **Generate Link**. The Open Primo Studio link appears.
4. Select **Open Primo Studio** to open Primo Studio and customize the viewer.

For more information on using Primo Studio, see *Using Primo Studio*.

---

### Configuring the Order of Online Services

To configure the order of online services, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

With the Online Services Order page (**Configuration Menu > Fulfillment > Discovery Interface Display Logic > Online Services Order**), you can configure the order of the services that appear in the services results list in View It. By default, all services are displayed alphabetically on the services result list. If a service is added to the top or bottom group on this page, that group is displayed on the services results list in the order that you specify, with the remainder of entries retaining their default sort order. The **Display CZ Collections first**, **Prefer source service**, and **Prefer ID based Linking services** radio buttons also override both the default alphabetic sort order as well as the list of services listed in the **Top services** section. The top service defined can be used by Primo’s direct linking option, from the search result record.

### Online Services Order Page

<table>
<thead>
<tr>
<th>Top services</th>
<th>Add to top</th>
</tr>
</thead>
<tbody>
<tr>
<td>Move Up</td>
<td>Move Down</td>
</tr>
<tr>
<td>Service type</td>
<td>Service name</td>
</tr>
<tr>
<td>1</td>
<td>OCLC</td>
</tr>
</tbody>
</table>

**Note**

You can only configure the online services order at the institution level. Select the required institution from the **Configuring** filter on the Fulfillment Configuration page.

---

**To configure the display order of services:**

1. On the **Online Services Order** page, select either **Add To Top** to assign high priority to a service or **Add to Last Services** to assign low priority to a service. Services that are left unassigned will appear in the middle of the list. The **Add Service** dialog box opens.
2. In the **Service type** field, select one of the following service types:
   - Full Text
   - Selected Full Text

   **Note**
   The Service type, DB Service is obsolete and should not be selected.

3. In the **Service name** field, select the name for the selected service type. The **Service value** field appears.
4. In the **Service value** field, browse and select a service value.
5. Depending on the type of priority you are assigning to the service, select **Add to top** or **Add to last services** to save the service to the selected priority list.
6. Select the arrows in the **Move Up** and **Move Down** columns to order the services in the **Top Services** and **Services to be placed last** lists.
7. In the **Display CZ collections first** field, select one of the following options:
   - **Yes** – The online resources are sorted alphabetically in each level (top, unspecified, and last). In addition, Community Zone resources are alphabetized and listed first in each level.
   - **No** – The online resources are sorted alphabetically in each level (top, unspecified, and last) only. Priority is not given to Community Zone resources.

   **Note**
   You can also set this priority with the `uresolver_display_cz_records_first` parameter in the Customer Parameters mapping table. For more information, see Configuring Other Settings.

8. If you set **Prefer source service** to **Yes**, you improve 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.
9. In the **Prefer ID based Linking Services** field, select one of the following options:

- **Yes** – If a collection with a preferred ID is defined, it always appears first regardless of other sort criteria. If more than one preferred collection is defined, the display preference for those collections is then based on the sort configuration as defined in the Online Services Order page. Currently, there are two vendors with a preferred ID, ProQuest and Gale.

- **No** – No priority is given to vendors with a preferred ID.

---

**Note**

You can also set this priority with the `uresolver_use_source_to_target_ordering` parameter in the Customer Parameters mapping table. For more information, see [Configuring Other Settings](#).

If a service was hidden using the display logic rules, it will not appear, regardless of the value selected for this option.

---

### Configuring the Order of General Electronic Services

To configure the order of general electronic services, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

With the General Electronic Services Order page, you can configuring the order in which general electronic services appear in Primo. Like other services, you can also assign services to appear in the first or last group in the list, or order them in a specific sequence.

![General Electronic Services Order Page](image)

**General Electronic Services Order Page**

---

**Note**

You can only configure the order of general electronic services at the institution level. Select the required institution from the **Configuring** filter on the Fulfillment Configuration page.

---

**To configure the display order of general electronic services:**

1. On the General Electronic Services Order page (Configuration Menu > Fulfillment > Discovery Interface Display Logic > General Electronic Services Order), select **Add to top** or **Add to last services** to configure the order of services at the top and bottom of the list of results, respectively.
2. In the Service type field, select General Electronic Service.

3. In the Service name field, select Service.

4. In the Service value field, select a service value.

5. Depending on which list you are defining, select either Add to top or Add to last services. The service appears in the list that you are defining.

6. For each list, select the arrows in the Move Up and Move Down columns to order the services.

### Configuring the Order of Locations in Primo Search Results

To configure the order of Primo search results, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Alma determines the location display priority primarily by availability. Holdings with the greatest number of available items are displayed first (this cannot be configured). In addition, Alma enables you to give preference to locations that match the IP address of the patron’s IP address. These locations include the AVA $$P field. For more information, see the following topic: [Discovery in Collaborative Networks](#)

Based on one or more of the following criteria, holdings locations are displayed in order on the first page in Primo Get It:

- According to the holdings’ locations and their proximity to the patron, according to the library IP address. The locations in the libraries closest to the patron appear at the top of the holdings list. If this criteria is used, it takes priority over the holdings’ availability.

- According to the holdings’ availability, in the order (by default):
  1. In temporary locations
  2. In permanent locations
3. In remote locations

You select this order on the Locations Ordering Profile page (Configuration Menu > Fulfillment > Discovery Interface Display Logic > Locations Ordering Profile).

![Locations Ordering Profile Page](image)

**Note**

You can configure this ordering at the institution level only. Select the required institution from the Configuring filter on the Fulfillment Configuration page.

---

**To configure a locations ordering profile:**

1. In the Use Alphabetical Sorting Only field, select Yes to sort the holdings alphabetically by the external location name in Primo Get It. The order of the locations is passed to Primo in the AVA $$p subfield during RTA. The alphabetical sorting logic is hard-coded.

   When this option is set to Yes, all other ordering options on this page are disabled.

2. In the Use "IP best location" sorting field, select Yes to configure the display of holdings by location. 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.

   IP addresses can be configured:
   
   ◦ On the library level (see Managing IP Definitions for a Library)
   
   ◦ On the campus level (see Editing a Campus)

3. In the Prefer remote storage field, select Yes to increase the priority of remote storage items when viewing results in Primo Get It, publishing to Primo, or the Primo RTA.

4. Select Save.

---

**Configuring Other Settings**

On the Other Settings page (Configuration Menu > Fulfillment > Discovery Interface Display Logic > Other Settings), additional settings are available to configure how Alma information appears in Primo.
Alma allows you to display an electronic resource's license information in View It. The displayed terms of the license can be configured in Alma, as well as the license-related labels that display in View It.

Note
This section applies only to Primo. For information on how to configure license information to display in Primo VE and Alma-Summon environments, see Displaying License Information.

Displaying License Information

After the user selects the **Show license** link, the name of the link changes to **Hide license**, and the license information appears as configured in Alma:
To display license information in View It:

1. Specify which license terms to display in View It. For information on the Display to Public field, see [To add a license term](#).
2. If needed, modify the license-related labels, which are defined by the codes that contain a c.uresolver.viewit.license prefix. For more information, see [Configuring Labels](#).
3. Open the Other Settings page (Configuration Menu > Fulfillment > Discovery Interface Display Logic > Other Settings).
4. Select the Enable Display of License Information check box.
5. Select Save.

For more information on configuring the license terms in Alma, see [Managing License Terms](#).

---

**Displaying Access Model**

To control the presentation of the access model to patrons in Primo, select the Enable Display of Access Model parameter. This displays the access model information in Primo, based on the access model indicated in the electronic portfolio (see [Real-Time Ordering](#)).

This option is disabled by default.

---

**Include Representation Services Statistics in Analytics**

The Include Representation services in link resolver statistics parameter allows you to include representation services usage in analytics link resolver statistics.

---

**Enable Delivery Login**

You can determine if the delivery login link from the Alma Viewer and from digital services in the link resolver is displayed. For more information, see [The Alma Viewer](#).

---

**Configure Maximum Number of Representations in ViewIt/Primo**

The Max. Number of Representations in View It parameter allows you to define the maximum number of digital representations that appears in View It. If there are more representations to display than the number configured here, a More... link appears. The patron can select More... to display the full list of representations available in a new browser tab.
Configure Order of View It Services

The Order of View It Services parameter allows you to configure whether electronic or digital services appear first in View It. Select Electronic, Digital or Digital, Electronic.

Configure How Representations are Grouped in ViewIt/Primo

To configure how representations are grouped in View It, select an option from the Group Representation Delivery Services by drop-down list:

- Viewer – representations are grouped by viewer
- Representation – representations are listed separately with the available viewers for each representation.

Configure a Delimiter for Grouping Delivery Metadata with Repeated Labels

To configure a delimiter for metadata with repeated labels in digital viewers, enter a delimiter to the Delimiter for Grouping Repeated Delivery Metadata field.

Note

If you enter a delimiter in the Delimiter for Grouping Repeated Delivery Metadata field, the Hide Repeated Labels checkbox for the Alma Viewer in Configuration > Fulfillment > Discovery Interface Display Logic > Viewer Services > Alma Viewer does not appear. To have it appear, you must remove the delimiter. For more information, see Configuring Digital File Viewer Services.

Use Primo VE Metadata Fields for Delivery

For Primo VE customers only, you can configure the metadata fields that appear in Alma viewers with the same page that you use to configure the metadata fields for Primo VE. This allows you to display the same descriptive information in Alma viewers as you do in Primo VE. To enable this feature, select the Use Primo Metadata Fields for Delivery check box. For information on how to configure metadata for Primo VE, see Configuring the Details Service for Primo VE.
Using Standard Identifiers

With the **Find GetIt services based on standard identifiers only** parameter (Configuration Menu > Fulfillment > Discovery Interface Display Logic > Other Settings), the Primo/Primo VE Get It feature (that you select to request/discover local Alma physical holdings) uses the following strong standard identifiers:

- ISSN
- E-ISSN
- ISBN
- E-ISBN
- LCCN
- CODEN
- OCLC Unique Number
- Other System Number

Using strong identifiers generally provides better results.

By default, this option is not selected; and the original logic for matching on title or title + author is used. This weaker matching criteria may provide less desirable Get It results.

Note that when you select **Get It** from your Primo/Primo VE search results and the **Find GetIt services based on standard identifiers only** parameter is selected, holdings that were received from an OpenURL (in your Primo/Primo VE search results) are ignored when Alma processes the Get It request if those holdings do not include or match on any of the strong standard identifiers shown above.

Filtering the Library List for Availability in Primo

The Primo View Mapped into Alma Libraries page allows you to filter the list of libraries that initially appear in Primo Get It when presenting availability information about an inventory item. If libraries are configured, these libraries initially appear for the item; the patron can see all of the libraries after removing the filter. If no libraries are configured, all libraries appear by default.
To add libraries to the list of initial libraries in Get It:

1. Open the Primo View Mapped into Alma Libraries page (Primo: Configuration Menu > Fulfillment > Discovery Interface Display Logic > Primo View to Libraries; Primo VE: Configuration Menu > Discovery > GetIt Configuration > Primo View to Libraries).

2. Add a library to the list:
   1. Select Add Row to open the dialog box.
   2. Specify the following fields:
      - **View** – Specify the Primo view code.
      - **Library Code** – Specify an Alma library code. To find library names and codes, see Adding/Editing Institution Libraries.
   3. Select Add Row in the dialog box to save the library to the default list.

3. When you are done adding libraries, select Save or Customize (first time only) to save your changes to the list.

---

**Customizing Primo Request Forms**

To configure the displayed fields on the Primo request forms, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

**Note**

This section applies only to Primo. For information on how to configure request forms for Primo VE and Alma-Summon environments, refer to the following sections:
You can hide non-mandatory fields on Primo request forms: hold request, booking request, and digitization request. All fields, except the General Use Label field, are visible by default.

For the digitization request form, you can customize the default value for the Partial field using the uresolver_partial_digitization_default_value parameter on the Other Settings page (see Configuring Other Settings) and then hide it using this feature. This is useful, for example, to restrict patron digitization requests to partial digitization requests.

The General Use Label field is hidden by default. This field is a general field for providing information to the patrons. To configure this text, see Configuring Service Labels in the Discovery Interface.

The Calculate Queue button is available on the Hold Request Form and the Booking Request Form to allow a Primo patron to view his or her request's place in the queue before submitting the request. The button is hidden by default but can be made visible by setting the Display to Public value to true for the calculateQueueButton.

The Item Availability option is available on the Resource Sharing Form. When the field is selected, a real time background check is performed when a patron opens a request form on the Primo Get It tab, or using the blank request form to determine whether any rota partner has a requestable copy of the resource. The check works with other alma partners or brokers and functions with the same rules as the regular locate process. An indication is displayed as to which partners have the item available. A warning is displayed to the patron if a copy appears to be unavailable. If one of the partners does not have a locate profile, an error message is displayed, Availability information can't be retrieved.

The forms are customized on the following pages:

- Hold Request Form - Primo: Configuration Menu > Fulfillment > Discovery Interface Display Logic > Hold Request Form Customization; Primo VE: Configuration Menu > Discovery > GetIt Configuration > Hold and Booking Request
• Booking Request Form - **Primo**: Configuration Menu > Fulfillment > Discovery Interface Display Logic > Booking Request Form Customization; **Primo VE**: Configuration Menu > Discovery > GetIt Configuration > Hold and Booking Request

![Booking Request Form Customization Page](image)

• Digitization Request Form - **Primo**: Configuration Menu > Fulfillment > Discovery Interface Display Logic > Digitization Request Form Customization; **Primo VE**: Configuration Menu > Discovery > GetIt Configuration > Digitization Request

![Digitization Request Form Customization Page](image)
Purchase Request Form - **Primo**: Configuration Menu > Fulfillment > Discovery Interface Display Logic > Purchase Request Form Customization; **Primo VE**: Configuration Menu > Discovery > GetIt Configuration > Purchase Request

To customize the visible fields on a Primo request form:

1. On the relevant page (see above), for each field that you want to change, select **Customize** and then select the desired option from the **Display to Public** drop down box (**No** to hide the field, **Yes** otherwise).

   **Note**
   Mandatory fields such as the **Pickup Location** field cannot be hidden.

2. Select **Save**.

**Customizing Primo Resource Sharing Forms**

To configure the displayed fields on the Primo resource sharing forms, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

**Note**
This section applies only to Primo. For information on how to configure resource sharing forms for Primo VE and Alma-Summon environments, refer to the following sections:

- Configuring Request Forms for Primo VE
- Configuring Request Forms for Alma-Summon
For more information about customizing Primo's resource sharing forms, see the Customizing Primo Resource Sharing Forms video (1:03 mins).

You can hide non-mandatory fields on Primo resource sharing request forms. All fields are visible by default.

You must enable the rs_use_new_mashup_form parameter on the Other Settings page (see Configuring Other Settings) for the Resource Sharing Form Customization link to appear on the Fulfillment Configuration menu.

### Resource Sharing Form Customization

#### Book fields

<table>
<thead>
<tr>
<th>Move Up</th>
<th>Move Down</th>
<th>Field Name</th>
<th>Mandatory</th>
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</tr>
</thead>
<tbody>
<tr>
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<td>Creator type</td>
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</tr>
<tr>
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<td></td>
<td>Description</td>
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#### Article fields

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<td>Author (Last name, first name)</td>
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<td>Author initials</td>
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<td>Volume</td>
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<td>Issue</td>
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<td>Chapter</td>
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<td>Source</td>
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<td>Series Title Number</td>
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<td>Fill the Pages of the Start and End fields</td>
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<td>Pages to photostory</td>
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<td>Start page</td>
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<tr>
<td></td>
<td></td>
<td>End page</td>
<td></td>
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</table>

#### Delivery information fields

<table>
<thead>
<tr>
<th>Move Up</th>
<th>Move Down</th>
<th>Field Name</th>
<th>Mandatory</th>
<th>Visible</th>
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</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Physical</td>
<td></td>
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<td></td>
<td></td>
<td>Digital</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Physical-returnable</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Reserve Material</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Deliver to Store</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td>Alternative address</td>
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<td></td>
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<td></td>
<td>Preferred Pickup Institution</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Preferred Pickup Location</td>
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<td></td>
<td></td>
<td>Allow Other Library</td>
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<td></td>
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<tr>
<td></td>
<td></td>
<td>Pickup/delivery location</td>
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<td></td>
<td></td>
<td>Alternate addresses</td>
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<td>Not Needed After</td>
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<td></td>
<td></td>
<td>Comment</td>
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<td>Maximum fee</td>
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<td></td>
<td></td>
<td>Level of Service</td>
<td></td>
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<td></td>
<td></td>
<td>Language</td>
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<td></td>
<td></td>
<td>Copyright</td>
<td></td>
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</tr>
<tr>
<td></td>
<td></td>
<td>I have read the above statement and agree to abide by its restrictions</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
To customize the visible fields on a Primo request form:

1. You can set the order of the fields on the request form, by sorting the fields in this mapping table. There are two methods to change a field's location in the list.

2. Select the up or down arrow next to the field to move until the field is in the desired order.

3. Select the check box to the left of the arrows. In the drop-down box below the section, select a field name or First or Last. Select the Move Selected button. If a field name is chosen, the checked field will move to the position just above the field in the drop-down box.

   Italicized fields in the Book fields and Article fields sections may not be moved. Italicized fields in the Delivery information fields section will move together as a group with the non-italicized field immediately above them.

4. Select or deselect the Mandatory and Visible check boxes as desired.

5. Select Save.

The default level of service is only selected in Primo when using the new form (by setting the rs_use_new_mashup_form parameter to True).

**Configuring Holdings Display Labels**

For Primo VE environments, see Configuring Holdings Display Fields for Primo VE.

To configure the holdings display labels, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

The Holdings Display Labels and Order code table configures the holdings fields that display in the Get It section of the record's full display, and allows you to perform the following actions:

- Enable/disable the display of holdings fields.
- Specify the order in which holdings fields appear in Get It.
- Customize and translate the display labels for each of the holdings fields.
- Add a new display field.

Access the Holdings Display Labels page (Configuration Menu > Fulfillment > Discovery Interface Display Logic >...
Holdings Display Labels

To configure display labels:

1. Add a row for the display label, including the code, the description, and whether the code is the default value. Select Add Row.
2. From the Filter drop-down, select the language for which you will enter a translation value.
3. In the Translation field of the label, enter the value that will appear in the translation.
4. If there are additional languages that will use a translation value, select the next language from the Filter drop-down and repeat step 3.
5. Select Save.

Configuring Primo Holdings Display

For Primo VE environments, see Configuring Holdings Display Fields for Primo VE.

To configure the Primo holdings display, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

The Primo Customized Holding mapping table allows you to map information from the source's holdings record to Primo VE for display in the following fields in the Get It section of the record's full details: Holdings, Supplementary Material, Note, Binding, Source of Acquisition, Ownership of Custodial History, and Indexes. For example, you can map MARC 866 a,z to the Holdings display field.

Access the Primo Holdings Display page (Configuration Menu > Fulfillment > Discovery Interface Display Logic > Holdings Display Customization).

Note

In order to access this page, you must have the uresolver_enable_getit_holding_configuration customer parameter set to true.
To configure the holdings display:

1. Add a row for the holdings customization, including the holdings field and subfield along with the label, applicable CSS class, and the column in which the field will appear. Select Add Row.

2. Select Save.

Configuring Primo Fines & Fees Currency Symbols

To configure the displayed currency symbols on the Primo fines and fees listing, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Note

Currently, this capability is applicable to Alma-Primo environments only.

You can define the currency symbol exposed to the Primo user in Fine & Fees under My Account. The table is empty by default and can be customized according to the institution's enabled languages.

Access the Currency Symbols page (Configuration Menu > Fulfillment > Discovery Interface Display Logic > Currency Symbols).
To configure currency symbols:

1. Add a row for the currency type, including the currency description and whether the description is the default for this currency. Select Add Row.
2. From the Filter drop-down, select the language for which you will enter a translation value.
3. In the Translation field of the currency, enter the value that will appear in the translation of the Primo Fines & Fees page.
4. If there are additional languages that will use a translation value, select the next language from the Filter drop-down and repeat step 3.
5. Select Save.

Configuring the Collection Title Sorting Routine

You can configure the options that display in the Sort titles by drop-down list (Resources > Manage Collections > Edit Collection > Discovery Tab), which defines the default sort type on the Collection's page in Primo and Primo VE.
For Primo only, you configure the options in this list from the Collection Title Sorting Routine table (Configuration Menu > Fulfillment > Discovery Interface Display Logic > Collection Title Sorting Routine).

**Note**

The active codes in this table must match the codes defined in Primo's Sort Fields Config mapping table (Primo Home > Advanced Configuration > All Mapping Tables > Sort Fields Config).

![Collection Title Sorting Routine](image)

Collection Title Sorting Routine
Configuring Fulfillment Jobs

To configure fulfillment jobs, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can configure some aspects of some fulfillment jobs on the Fulfillment Jobs Configuration page (Configuration Menu > Fulfillment > General > Fulfillment Jobs Configuration). Configurations performed on this page are applicable at the institution level only.
### Fulfillment Job Configuration

**Borrowing Activity Report Job**
- **Status:** Active
- **Actions:**新
- **Schedule:** Every day at 02:00

**Send Overdue Notice and Handle Non-Renewal Job**
- **Status:** Active
- **Actions:**新
- **Schedule:** Every day at 18:00

**Send Overdue Notice and Handle Non-Renewal Job**
- **Status:** Active
- **Actions:**新
- **Schedule:** Every day at 24:00

**Authorization Job**
- **Status:** Active
- **Actions:**新
- **Schedule:** Every day at 02:00

**Leave - Overdue Fax Form莱**
- **Status:** Active
- **Actions:**新
- **Schedule:** Every day at 12:00

**Leave - Fax Form after Calendar Change**
- **Status:** Active
- **Actions:**新
- **Schedule:** Every day at 24:00

**Requests - Handle Loanoverd Due**
- **Status:** Active
- **Actions:**新
- **Schedule:** Every day at 02:00

**Resolve Expedited Delivery Requests**
- **Status:** Active
- **Actions:**新
- **Schedule:** Every day at 24:00

**Requests - Resolve Temporarily Withdrawn Items**
- **Status:** Active
- **Actions:**新
- **Schedule:** Every day at 24:00

**Requests - Resolve Uninvoiced Items**
- **Status:** Active
- **Actions:**新
- **Schedule:** Every day at 24:00

**Send Email Message to Resource Sharing Arranging Partner**
- **Status:** Active
- **Actions:**新
- **Schedule:** Every day at 24:00

**Resolve Resource Sharing Requests**
- **Status:** Active
- **Actions:**新
- **Schedule:** Every day at 24:00

**Library - Renew Books**
- **Status:** Active
- **Actions:**新
- **Schedule:** Every day at 24:00

**Assign/Reassign Users**
- **Status:** Active
- **Actions:**新
- **Schedule:** Every day at 24:00

**Requests - Send report**
- **Status:** Active
- **Actions:**新
- **Schedule:** Every day at 24:00

**Update to DRS Requests**
- **Status:** Active
- **Actions:**新
- **Schedule:** Every day at 24:00

**Legends for Oze**
- **Status:** Active
- **Actions:**新

**DOC Generator**
- **Status:** Active
- **Actions:**新
- **Schedule:** Every day at 02:00

**Legends One Click Activation**
- **Status:** Active
- **Actions:**新

**Reserve Sharing Estimation and Request Estimation**
- **Status:** Active
- **Actions:**新
- **Complete requests before:** Every day at 24:00

**Reserve Sharing Estimation and Cancellation**
- **Status:** Active
- **Actions:**新
- **Schedule:** Not scheduled
For more information on these jobs, see Viewing Scheduled Jobs.

If a scheduled job is not run, the records that were missed are selected for the following run. This is true for all jobs except for Send Overdue Notices.

Each job may be activated, deactivated, or scheduled. Additionally:

- **Borrowing Activity Report Job** - Appears in the Monitoring Jobs area as the Notifications - Send Periodic Fulfillment Activity job. The job generates the Borrowing Activity Letter. You can run the job immediately from this page.

- **Send Courtesy Notices and Handle Loan Renewals** - The Notifications - Send Courtesy Notices and Handle Loan Renewals job does one of the following, depending on the automatic loan renewal rules, Terms of Use, and existing recalls:

  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**
  
  These settings can also be configured on the Configuration Menu > Fulfillment > General > Other Settings Mapping Table page. Modify the **auto_renew_loan_days** and **send_courtesy_notices_behaviour** parameter values (see Configuring Other Settings).

  This job 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, if:
  
  - the job runs on June 10 with the **Days before due date = 7**
  - then the job runs again on June 11 with the **Days before due date = 7**

  then:

  - loans with a due date of June 17 are included in the June 10 job and loans with a due date of June 18 are included in the June 11 job.
  - 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.

  **Note**
  
  If the loan will be automatically renewed at a future time, the courtesy notice is not sent.

  - If the conditions of an automatic loan renewal rule are met – the loan is automatically renewed.
  - A courtesy notice is sent if a block exists on the patron or item, preventing item renewal (see Configuring Block Preferences). By default, one notification is sent per patron. See also Configuring Other Settings. The **Handle loans** field can be set as follows:

    - **Daily when due date is within range** - this value corresponds with the DD_WITHIN_RANGE_DAILY value of the send_courtesy_notices_behaviour parameter. When selected, the job runs on loans with a due date from the last run date until today plus the value of the **Days before due date** field, which corresponds to the auto_renew_loan_days parameter. This means multiple courtesy notices are sent if the loan is not renewed. For example, if the days parameter is set to 7 and the loan cannot be renewed (i.e. it is requested) then a
• **Reminder** to the patron is sent every day until the day the item is due. It allows the notification to be sent daily until the item is due.

  • **When due date exactly matches defined day** - this value corresponds with the DD_ON_EXACT_DEFINED_DAY value of the send_courtesy_notices_behaviour parameter. The courtesy notice is sent only on the exact day based on the **Days before due date** that the courtesy notice is set to send. The courtesy notice is not resent.

  • **Once when due date is within range** - this value corresponds with the DD_WITHIN_RANGE_ONCE value of the send_courtesy_notices_behaviour parameter. The courtesy notice is sent only once on or after the days before due date as defined in the job.

  ◦ If the conditions of an automatic loan renewal rule are not met (and the loan is therefore not renewed) – sends a courtesy notice informing the patron that the item is due. For details on configuring automatic loan renewal rules, see **Configuring Automatic Loan Renewal Rules**.

  • **Send Overdue Notices Job** - Appears in the Monitoring Jobs area as the **Notifications - Send Due Date Reminders** job.

  • **Fines/Fees Notifications Job** – You can run the job immediately from this page; see **Fines/Fees Notifications** job.

  • **Anonymization Job** – Appears in the Monitoring Jobs page as **Fulfillment – Handle Historical Archiving**. For configuration information, see **Configuring Anonymization** below.

  • **Loans - Overdue and Lost Loan Job** – Appears in the Monitor Jobs page as **Loans – Overdue and Lost Item**. This job runs on loans created after the previous running of the job that match the criteria of the profile.

  • **Loans - Due Date Correction after Calendar Change** - See **Loans - Due Date Correction after Calendar Change** job.

  • **Requests - Handle Expiration Step** - See **Requests - Handle Expiration Step** job.

  • **Handle Expired Booking Requests** - See **Handle Expired Booking Requests** job.

  • **Requests - Restore Temporarily Shelved Items** - See **Requests - Restore Temporarily Shelved Items** job.

  • **Requests - Recalculate after Inventory Update** - See **Requests - Recalculate after Inventory Update** job.

  • **Send Overdue Message to Resource Sharing Borrowing Partner** - See **Send Overdue Message to Resource Sharing Borrowing Partner** job.

  • **Expired Resource Sharing Request** - See **Expired Resource Sharing Request** job.

  • **Users - Remove Blocks** - See **Users - Remove Blocks** job.

  • **Activate/Deactivate Courses** - See **Activate/Deactivate Courses** job.

  • **Requests - Send Report** - See **Requests - Send Report** job. You can select which requests to include:

    ◦ Non Active Requests
    ◦ Requests in process
    ◦ Requests on hold shelf

  • **Email Leganto Notifications to Users** (Leganto only) - See **Configuring Notifications** in the Leganto documentation.

  • **Update BLDSS Requests** - You can activate or deactivate this job as a scheduled job, or you can manually run it. See **Update BLDSS Requests** job.

  • **Distribute Resource Sharing Network Configuration** (Network Zone only) - In the **Warning Percentage Threshold** field, enter a whole number. If the percentage of records that fail to distribute stays at or below this figure, the job displays a warning. If the percentage is exceeded, the job fails. See the **Distribute central resource sharing configuration** job.

  • **DCS Synchronize** - See **DCS Synchronize** job.

  • **Resource Sharing Completed Request Cleanup** - See **Resource Sharing Completed Request Cleanup** job. Select:
Whether to clean up borrowing or lending requests, or both.
- The number of days after which to clean up the requests.
- The status of the requests to clean.
- Whether to schedule the job.

**Resource Sharing Claiming and Cancellation** - Send claim or cancellation messages for relevant resource sharing requests. See information on the Automatic Claim and Automatic Cancel fields on the [Resource Sharing Partners page](#).

For details on letters that Alma sends to patrons with these jobs, see [Configuring Alma Letters](#).

---

**Note**

- Fulfillment jobs can be configured at the institution level only. Select the required institution from the **Configuring** filter on the Configuration page.
- Schedule times depends on the time zone in which the institution is located.
- The **Run Now** option appears for some of the jobs on this page, but not for others. For some jobs, such as the Loans - Overdue and Lost Loan Job, the option appears on other pages.

---

**Configuring Anonymization**

This section deals with transactional anonymization relating to transactions of type loans, fines and fees, resource sharing requests, and requests. For information about non-transactional anonymization, see [Anonymizing Analytics Report Details](#).

---

**Note**

- For questions and answers about anonymization, see the [Data Privacy FAQs](#).
- For more information about anonymization, see [Anonymization in Alma and the Effect on Alma Analytics](#).

---

**To configure the Anonymization job:**

- Select **Anonymize item loans** to enable deleting user information in completed loans. Note that loans with open fines/fees cannot be anonymized.
- Select **Anonymize fines and fees** to enable deleting user information in closed fines/fees.
- Select **Anonymize requests** to enable deleting user information in completed and deleted requests.
- Select **Anonymize resource sharing requests** to enable deleting user information in completed and deleted resource sharing requests.

The **should_anonymize_requests_immediately_when_complete** parameter, when set to **true** anonymizes the request as soon as it is completed and also ignores the anonymization rules.

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:
After the job runs, the Borrower Name and Borrower ID do not appear:

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)

To configure Anonymization Rules:
1. After selecting any of the anonymize options, each option has a rules link next to it. Select the link. The anonymization rules are activated only when the **Anonymize item loans** check box is selected.

2. Add a new rule or edit an existing rule.

3. The input parameters are as follows:

<table>
<thead>
<tr>
<th>Rule Type</th>
<th>Parameter</th>
<th>Operators</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loan</td>
<td>Days since loan ended</td>
<td>&lt;, &gt;, =, not equals</td>
<td>Whole numbers are counted. So if Days since loan ended &gt; 1 and the loan ended yesterday, the loan is not anonymized.</td>
</tr>
<tr>
<td></td>
<td>Days since user expiry</td>
<td>&lt;, &gt;, =, not equals</td>
<td>Whole numbers are counted. So if Days since user expiry &gt; 1 and the user expired yesterday, the loan is not anonymized.</td>
</tr>
<tr>
<td>Library</td>
<td>=, in list, is empty, is not empty, not equals, not in list, contains</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| Location  | =, in list, is empty, is not empty, not equals, not in list, contains | | If Library input was added, the location list is populated according to the selected libraries.
If library input was not added, the list is empty. |
<p>| Number of loans to retain | = | | For example, if a rule is set with Number of loans to retain = 3 and there are three loan history records for an item, they are not anonymized. If there are four loan history records for the item then only the oldest one is anonymized. |
| User group | =, in list, is empty, is not empty, not equals, not in list, contains | | |
| Fines and Fees | Days since fine/fee closed | &lt;, &gt;, =, not equals | |
|           | Days since user expiry | &lt;, &gt;, =, not equals | |
| Library   | =, in list, is empty, is not empty, not equals, not in list, contains | | |
| User group | =, in list, not equals, not in list | | |
| Request Anonymization Rule | Days since request ended | &lt;, &gt;, =, not equals | |
|           | Days since user expiry | &lt;, &gt;, =, not equals | |</p>
<table>
<thead>
<tr>
<th>Rule Type</th>
<th>Parameter</th>
<th>Operators</th>
<th>Description</th>
</tr>
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<tbody>
<tr>
<td>Library</td>
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<td>has not been, has not in list, contains</td>
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<td>Location</td>
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<td>User group</td>
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<td>Borrowing</td>
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<td>Request</td>
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<td>Anonymization Rules</td>
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<tr>
<td></td>
<td>is not empty,</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>is not equals</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>not in list</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Note

When a request is fulfilled, if there are multiple items available and the request was attached to a specific item (for instance, item level request or item already fulfilled the request) the library and location of the item is used. If the request can still be fulfilled by multiple items, the library and location are taken from the holding selected automatically as preferred for fulfilling the request.

4. Select **True** or **False** for the output parameter, **Anonymize**.

5. Select **Save**.

By default, the Loan Anonymization Rules are set to **False**. In cases where select loan types should not be anonymized, the rule should be set to **False**.

### Configuring Other Settings (Fulfillment)

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 (Configuration Menu > Fulfillment > General > Other Settings).

<table>
<thead>
<tr>
<th>Parameter Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>add_checked_at_information_to_loan_details_in_primo</td>
<td>Set to true to enable the display of the checkout location on the Location field on the Primo My Account Loans. By default, this parameter is set to false, which suppresses the checkout location.</td>
</tr>
<tr>
<td>allow_activity_on_transferred_finesfees</td>
<td>If the bursar import is activated and this is set to true, you can perform activities such as payment or waive on fines/fees that have been exported to the bursar system. The Waive link appears on the row action menu of the Fines/Fees tab of the User Details page when this parameter is set to true. When set to false, which is the default, transferred fees cannot be changed. See Managing User Fines and Fees.</td>
</tr>
<tr>
<td>auto_renew_loan_days</td>
<td>The number of days entered determines which loans are considered for automatic renewal. So, for instance, if auto_renew_loan_days contains 7, all loans whose due date is within the next 7 days are considered. For those loans, the renewal is carried out according to the automatic renewal policies. See Configuring Automatic Loan Renewal Rules.</td>
</tr>
<tr>
<td>blocks_display_remove_duplicates</td>
<td>Determines whether to display only one block of each type when a user has multiple blocks of the same type. When false, which is the default, all blocks are displayed. When true, duplicate blocks are removed from the following displays:</td>
</tr>
</tbody>
</table>

Note

Other settings can be configured at the institution level only. Select the required institution from the Configuring filter on the Configuration page.
<table>
<thead>
<tr>
<th>Parameter Key</th>
<th>Description</th>
</tr>
</thead>
</table>
| check_pronoun_duplicate_borrowing_requests | Set to **true** to enable a check to verify that the request is not a duplicate of an already existing active request for the user. The fields that Alma uses to determine if the request is a duplicate are:  
  - Requester ID  
  - Title  
  - Journal Title  
  - OCLC Number  
  - ISBM/ISSN  
  - Volume  
  - Chapter  
  - Pages  
  - Issue  
  - Comment  
  If the requests are the same, a message appears to indicate that the new request is not saved. The text of the message can be configured on the Labels page (c.uresolver.request.ill.patron_has_duplicate_request). By default, this is set to **false**, which does not enable the check for duplicates. See Managing Resource Sharing Borrowing Requests. |
<p>| check_self_ownership_serial | Set to <strong>true</strong> to enable self-ownership checks to be performed for serial titles; the <strong>Resource Sharing</strong> link is hidden in the Get It/View It tabs in Primo. When <strong>false</strong>, self-ownership checks are not performed for serial titles, and the <strong>Resource Sharing</strong> link displays in Primo whether or not the serial is self-owned. |
| citation_rs_default_actual_pickup_location | (Optional) The default actual pickup location code when initiating a resource sharing request for a citation. When set, the checkbox <strong>For Reading-Room Use Only</strong> is selected in the request form (and cannot be disabled). This parameter is ignored if <strong>citation_rs_default_requester</strong>, <strong>citation_rs_default_owner</strong>, and <strong>citation_rs_default_requested_pickup_location</strong> are not set. See Managing Citations and Creating a Borrowing Request. |
| citation_rs_default_owner | (Optional) The default resource sharing library code owning the request when initiating a resource sharing request for a citation. This parameter is ignored if <strong>citation_rs_default_requester</strong> is not set. See Managing Citations and Creating a Borrowing Request. |
| citation_rs_default_requested_pickup_location | (Optional) The default requested pickup location code when initiating a resource sharing request for a citation. This parameter is ignored if <strong>citation_rs_default_requester</strong> and <strong>citation_rs_default_owner</strong> are not set. See Managing Citations and Creating a Borrowing Request. |
| citation_rs_default_username | (Optional) The default requesting librarian username when initiating a resource sharing request for a citation. See Managing Citations and Creating a Borrowing Request. |</p>
<table>
<thead>
<tr>
<th>Parameter Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>requester</td>
<td></td>
</tr>
<tr>
<td>close_paid_lost_loan</td>
<td>Set to <strong>true</strong> to enable a loan status to be changed to <strong>Lost and paid</strong> and the loan closed when an on loan item's status was changed to <strong>Lost</strong> and the last lost or replacement fee is closed. When set to <strong>false</strong>, which is the default for customers installed prior to the January 2019 release, the loan remains active in the loan list until the Close Lost Loans job is executed, and the item process type is changed to <strong>Lost</strong> even if the patron paid the lost fees. See <a href="#">Lost Loan Management</a>.</td>
</tr>
<tr>
<td>copyright_region</td>
<td>The two letter country code indicating the institution's region. Used for determining copyright licensing options and approval. The values are case sensitive. Currently, the only values that have any effect are:</td>
</tr>
<tr>
<td></td>
<td>• <strong>UK</strong> - Alma adds additional UK-related options to the <strong>Source for Copyright</strong> field (see <a href="#">Creating a Request</a>) and the <strong>Creative Commons License</strong> field (see <a href="#">Managing Citations</a>). In addition, Leganto integration with the UK Copyright Licensing Agency (CLA) and the Digital Content Store (DCS) is enabled; see <a href="#">Integrating with the UK's Digital Content Store (DCS)</a>. The Source for Copyright options are:</td>
</tr>
<tr>
<td></td>
<td>◦ A - From paper original owned by institution</td>
</tr>
<tr>
<td></td>
<td>◦ B - From digital original licensed to institution</td>
</tr>
<tr>
<td></td>
<td>◦ C - From copyright fee paid copy</td>
</tr>
<tr>
<td></td>
<td>◦ D - From another HEI under sharing provision</td>
</tr>
<tr>
<td></td>
<td>• <strong>AU</strong> (Australia) - Alma adds additional AU-related options to the <strong>Source for Copyright</strong> field (see <a href="#">Creating a Request</a>) and the <strong>Creative Commons License</strong> field (see <a href="#">Managing Citations</a>). The Source for Copyright options are:</td>
</tr>
<tr>
<td></td>
<td>◦ W - Electronic and non Paginated</td>
</tr>
<tr>
<td></td>
<td>◦ P - Hardcopy, or Electronic and Paginated</td>
</tr>
<tr>
<td></td>
<td>◦ G - Graphic/Artwork only</td>
</tr>
<tr>
<td>default_course_end_date</td>
<td>The default end date selected when adding a course (see <a href="#">Adding a Course</a>). If not set, the current date is used. The date must be formatted according to the institution's date format.</td>
</tr>
<tr>
<td>default_course_start_date</td>
<td>The default start date selected when adding a course (see <a href="#">Adding a Course</a>). If not set, the current date is used. The date must be formatted according to the institution's date format.</td>
</tr>
<tr>
<td>default_user_group_for_</td>
<td>Used by a resource sharing lender to define the default user group for the fulfillment network locate process and its rules calculation. Any institution level user group code can be used. By default, the value is empty. See <a href="#">Fulfillment Network Partner Configuration</a>.</td>
</tr>
<tr>
<td>fulfillment_network_locate</td>
<td></td>
</tr>
<tr>
<td>delivery_service_allowed_origins</td>
<td>When receiving a JSON HTTP response to your digital file viewer request (see <a href="#">Configuring Digital File Viewer Services</a>), you can ask Alma to add a URL for the CORS Access-Control-Allow-Origin header in the response. When left empty, Alma uses the request URL.</td>
</tr>
<tr>
<td>demerit_enable</td>
<td>Set to <strong>true</strong> to enable demerit functionality. For more information, see <a href="#">Enabling the Demerit System</a>.</td>
</tr>
<tr>
<td>demerit_maximum_threshold</td>
<td>The length of the demerit tracking period in days. If the user's demerit points exceed the value specified in the <strong>demerit_maximum_threshold</strong> 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 <a href="#">Enabling the Demerit System</a>.</td>
</tr>
<tr>
<td>demerit_history_days</td>
<td>The maximum number of points allowed during the tracking period. For more information, see <a href="#">Enabling the Demerit System</a>.</td>
</tr>
<tr>
<td>Parameter Key</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>maximum_threshold</td>
<td>The length of a user’s suspension period in days. For more information, see Enabling the Demerit System.</td>
</tr>
<tr>
<td>demerit_suspension_days</td>
<td>Set to true to show the partial digitization fields on the Get It form. Set to false to suppress the partial digitization fields from the Get It form.</td>
</tr>
<tr>
<td>distribute_fulfill_changes_last_run</td>
<td>The last run of the Distribute network fulfillment changes to members job. Relevant only for the Network Zone. See Configuring Fulfillment Information in the Network Zone.</td>
</tr>
<tr>
<td>document_delivery_cleanup_days</td>
<td>The number of days that digitized files remain on the document server. The default is 30, and the maximum is 90. See Attaching Digitized Items To Be Sent To a Patron.</td>
</tr>
<tr>
<td>email_partner_configurable_line1</td>
<td>Not currently supported</td>
</tr>
<tr>
<td>email_partner_configurable_line2</td>
<td>Not currently supported</td>
</tr>
<tr>
<td>enable_booking_workflow</td>
<td>When true, booking requests behave as all other patron physical requests. When false, a booking request is not activated, does not go through the hold shelf workflow, and does not appear in task lists.</td>
</tr>
<tr>
<td>enable_moving_item_to_hold_shelf_from_self_check</td>
<td>If set to false (which is the default value), a requested item that is checked in using a self-check machine is not placed on the hold shelf and the On Hold Shelf Letter is not sent. If set to true, the item is placed on the hold shelf and the On Hold Shelf Letter is sent. Note that the system determines whether the item should be placed on the hold shelf or enter hold shelf processing based on the definition of the Has hold shelf processing parameter at the circulation desk. It is also relevant only for self-check circulation desks with hold shelves. If there is no hold shelf at the circulation desk, the item enters the transit process.</td>
</tr>
<tr>
<td>enable_open_access_services_from_unpaywall_api</td>
<td>Set this customer parameter to true to include the open access service (when available) in the link resolver View It. When this customer parameter is set to false, the open access service is excluded from the link resolver View It. With this customer parameter set to true, the option Disable direct linking when Open Access service is available appears in the Direct Linking Configuration options. See Configuring Direct Linking for more information. The default setting for this parameter is false.</td>
</tr>
<tr>
<td>enable_request_during_loan</td>
<td>Set to true to enable patrons to request an item belonging to a bibliographic record for which the patron already has an item on loan, if the newly requested item has a different loan period policy than the original item.</td>
</tr>
<tr>
<td>Parameter Key</td>
<td>Description</td>
</tr>
<tr>
<td>---------------</td>
<td>-------------</td>
</tr>
<tr>
<td>for_different_policy</td>
<td>Set to True to exclude lost and claimed returned loans from the overdue limit (number of loans that are allowed to be overdue).</td>
</tr>
<tr>
<td>exclude_lost_and_claimed_returned_loans_from_overdue</td>
<td>The initial value of the pickup institution field in a fulfillment network request form.</td>
</tr>
<tr>
<td>ful_network_default_pickup_inst</td>
<td>The initial value of the pickup institution is blank.</td>
</tr>
<tr>
<td></td>
<td>The initial value is set to the patron's institution, meaning that linked account users show the patron's source institution.</td>
</tr>
<tr>
<td></td>
<td>The initial value is set to the local institution, as it has been in the past. This is the default.</td>
</tr>
<tr>
<td>fulfillment_network_shared_primo</td>
<td>Set to true to indicate that when working with local fulfillment network members (and not a Network Zone), you can use the Intellectual Entity information to enable the borrower to locate the item more accurately on the lender side.</td>
</tr>
<tr>
<td>fulfillment_network_unique_barcodes</td>
<td>Whether a fulfillment network uses unique item barcodes:</td>
</tr>
<tr>
<td></td>
<td>• FULL - Barcodes are unique across all members of the fulfillment network and are not duplicated. The Item Owner drop-down list does not appear on the Manage Patron Services, Return Items, or Scan In pages. Alma searches for the barcode, first locally, then in all other institutions. The search completes as soon as the barcode is matched and processing continues automatically.</td>
</tr>
<tr>
<td></td>
<td>Note Because the Full setting widens the search, this may impact performance.</td>
</tr>
<tr>
<td></td>
<td>• NONE - Barcodes are not unique. This is the default.</td>
</tr>
<tr>
<td>generate_resource_sharing_temp_barcode</td>
<td>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 the Request Attribute Field table in Creating a Borrowing Request).</td>
</tr>
<tr>
<td>getit_use_alphabetical_sorting</td>
<td>Set to true to use alphabetical sorting only when sorting holdings in the Primo Get It page. When set to false, which is the default, other sort criteria will be included. See Configuring the Order of Locations in Primo Search Results.</td>
</tr>
<tr>
<td>hide_single_holding_getit_details</td>
<td>When set to false (default), Get It displays a single holding's items with the holding's details expanded for a single holding. When set to true, the holding's details are initially collapsed. The holding's details are always collapsed if there are multiple holdings and one was explicitly opened. This parameter is only applied if the Primo View to Alma Libraries table is empty. See Filtering the Library List for Availability in Primo.</td>
</tr>
<tr>
<td>hold_shelf_additional_id_regex</td>
<td>This controls the format of the Additional ID, which is used in the following places:</td>
</tr>
<tr>
<td>Parameter Key</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>• Pick from shelf task list</td>
<td>The ID is hidden by default and can be added in the manage column display menu.</td>
</tr>
<tr>
<td>• Pick from shelf slips</td>
<td></td>
</tr>
<tr>
<td>• Hold shelf slips</td>
<td></td>
</tr>
<tr>
<td>• Hold shelf email to the patron</td>
<td></td>
</tr>
<tr>
<td>• Circulation desk hold shelf</td>
<td>configuration</td>
</tr>
<tr>
<td>• Active and Expired Hold Shelf</td>
<td>task lists</td>
</tr>
<tr>
<td>The value is empty by default. When</td>
<td>The Additional ID defaults to displaying with hyphens between every three digits, after truncating the last seven digits. To indicate a different display, enter a regular expression. The format is s/&lt;regex&gt;/destination. If an error is encountered in the value's format, the default format for Additional ID is used.</td>
</tr>
<tr>
<td>ignore_lender_due_date</td>
<td>Set to <strong>true</strong> to ignore a request's due date when loaning an item to a patron. The due date is instead calculated according to the Terms of Use defined in the fulfillment unit.</td>
</tr>
<tr>
<td></td>
<td>Additionally, this parameter controls the calculation of the expiration of items on the hold shelf. When set to <strong>true</strong>, the expiration date is calculated as the current date plus Maximum time on hold shelf (Days) from the circulation desk configuration. When set to <strong>false</strong>, the expiration date is calculated as the Due Date from the borrowing resource sharing request minus the Delivery Delay (days) from the Resource Sharing Partner record.</td>
</tr>
<tr>
<td>ill_item_creation_lib_code</td>
<td>The default code of the library in which to create the temporary items for resource sharing.</td>
</tr>
<tr>
<td></td>
<td>When working with multicampus libraries, leave this value blank and assign a resource sharing library in the patron record. Set to <strong>ALL</strong> to enable all configured resource sharing libraries to be enabled for all patrons. If a patron’s specific Terms of Use indicates that resource sharing libraries are not enabled, the patron’s Terms of Use overrides this setting.</td>
</tr>
<tr>
<td>ill_item_creation_loc_code</td>
<td>The default code of the location in which to create the temporary items for resource sharing.</td>
</tr>
<tr>
<td></td>
<td>When working with multicampus libraries, leave this value blank and do the following:</td>
</tr>
<tr>
<td></td>
<td>• Assign a resource sharing library in the patron record.</td>
</tr>
<tr>
<td></td>
<td>• Configure a default location for borrowing when configuring resource sharing information for a library (see Configuring Parameters of a Resource Sharing Library).</td>
</tr>
<tr>
<td>include_transferred_finesfees_in_alma_limits</td>
<td>If the bursar import is activated and this is set to <strong>true</strong>, fines and fees transferred to the bursar system are included when calculating the user cash limit and the amount for user option in the Fines/Fees Notification Profile. When set to <strong>false</strong>, which is the default, the transferred fees are not taken into account. See Managing User Fines and Fees.</td>
</tr>
<tr>
<td>maximum_overdue_block_per_block</td>
<td>Determines whether the Maximum Period for Overdue Block policy is applied to each block or to all the blocks in total. When the Block When Overdue policy is set to a cumulative option:</td>
</tr>
<tr>
<td></td>
<td>• If this parameter is set to <strong>true</strong>, the Maximum Period for Overdue Block policy is checked against each block separately.</td>
</tr>
<tr>
<td></td>
<td>• If this parameter is set to <strong>false</strong>, the Maximum Period for Overdue Block policy is checked against the total block period. If the maximum period is already blocked, then no new block will be created.</td>
</tr>
<tr>
<td></td>
<td>See Configuring Overdue Blocks Due to Overdue Loans.</td>
</tr>
<tr>
<td>missing_item_requestable</td>
<td>Set to <strong>true</strong> to enable requesting items marked as missing.</td>
</tr>
<tr>
<td>Parameter Key</td>
<td>Description</td>
</tr>
<tr>
<td>---------------</td>
<td>-------------</td>
</tr>
<tr>
<td>network_ display_logic_ distribution_ members_ behavior</td>
<td>Controls deactivation or deletion of institution rules at distribution time. The values for this parameter are None, Remove, and Deactivate. The default is None, which does not change the institution rules. Remove removes all institution rules. Deactivate deactivates all institution rules.</td>
</tr>
<tr>
<td>network_ display_logic_ rules_ precedence</td>
<td>Allows the Network Zone to determine which rules take precedence - the institution's rules or the network's rules. The default is False, which sets the institution rule to taking precedence. True defines the Network Zone rule as having precedence.</td>
</tr>
<tr>
<td>network_ges_ distribution_ members_ behavior</td>
<td>Controls what is done with a member institution's general electronic services records when the Network Zone's records are distributed. Valid values are: Remove, Deactivate, and None. Remove removes all the local records. Deactivate retains the local records but deactivate them. None, which is the default, leaves all previously existing records exactly as they were before the distribution.</td>
</tr>
<tr>
<td>network_rota_ assignment_ rules_ precedence</td>
<td>Whether the Network, Institution, or Library level rota assignment rules are executed first when running the Distribute central resource sharing configuration job.</td>
</tr>
</tbody>
</table>
| network_ sending_ rules_ precedence | Whether the Network, Institution, or Library level sending borrowing request rules are executed first when a new borrowing request is created.  

When set to true the following rules are applied:  
• If Network Zone rules exist, they are used.  
• If not, then if library level rules exist, they are used.  
• If neither Network Zone rules or library level rules exist, institution level rules are used.  

When set to false the following rules are applied:  
• If library level rules exist, they are used.  
• If not, institution level rules are used. |
| overdue_at_ change_due_ date | When set to true (the default), if a due date is changed on an already overdue loan, an overdue fine is created before the due date is updated (similar to the the renew process) to make sure that a potential overdue fine is not automatically dropped. To dismiss the charge in this case, set to false. See Adding an Overdue and Lost Profile and Changing Loan Due Dates in Bulk. |
| overdue_at_ claim_return_loan | Set to true if you want fines to stop accruing for items that were claimed to be returned (any fines already accrued get added to the user's total). Otherwise, set to false to have the fines continue to accrue. |
| overdue_at_ lost_loan | The value of this parameter determines:  
• Whether the overdue fine is applied to the user's balance when the loan is updated to lost.  
• Whether the overdue fine continues to accrue while the loan is lost.  

An overdue fine continues to accrue until it is applied. Once it is applied, it stops accruing. If this parameter is set to true, the overdue fine is applied when the loan is marked as Lost and, therefore, stops accruing. If set to false, the overdue fine is not applied when the loan is marked as Lost and, therefore, continues to accrue. In this case, if the lost loan is returned, the accrued fine is applied. |
<table>
<thead>
<tr>
<th>Parameter Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>overdue_lost_loan_profile_ignore_due_hour</td>
<td>Whether the due hour is taken into consideration when calculating if the loan is overdue in overdue and lost loan profiles. When set to false, which is the default, if the profile is set to match on 1 overdue day, then a loan that was due yesterday at 12:00 is considered overdue today at 12:01. If the due hour of the loan has not been reached when the job runs, the loan is not considered overdue until the following day. If set to true, the loan is considered a match immediately on the next calendar day, ignoring the due hour. So when the job runs on that day the loan is not considered overdue regardless of the hour. <strong>Note</strong> This parameter applies only to the Loans – Overdue and Lost Item job and not to overdue blocks.</td>
</tr>
<tr>
<td>patron_services_timeout_minutes</td>
<td>The number of minutes after which the Patron Services page closes. You can configure a value between 1-30 minutes. The default value is 2 minutes.</td>
</tr>
<tr>
<td>prefer_doc_delivery_from_e-resources</td>
<td>Set to true if you prefer to do digitization from electronic resource rather than from print resource when both exist.</td>
</tr>
<tr>
<td>prefer_remote_storage</td>
<td>Set to true to assign priority to remote storage items when viewing results in the Primo Get It tab, publishing to Primo, or the Primo Real-Time Availability (RTA).</td>
</tr>
<tr>
<td>primo_loan_list_sorting</td>
<td>The order in which loans are sorted in Primo My Account &gt; Loans. By default, the loans are listed in descending order by due date. The valid values are ascending and descending.</td>
</tr>
<tr>
<td>reading_list_auto_locate_citation_upon_creation</td>
<td>When true, when a librarian creates a non-repository citation, Alma tries to match and link the citation to an inventory item. If Alma succeeds, the citation’s status is Resource Located. Otherwise its status is Location Failed. When false, the librarian still can attempt to match the citation to inventory manually.</td>
</tr>
<tr>
<td>reading_list_citation_sorting</td>
<td>Determines the sort order of the citations in a reading list. Enter TITLE, AUTHOR, CALLNUMBER, CREATEDATE, or INSTRUCTORORDER (Leganto only: this sets the order according to the ordering set by the instructor in Leganto). The default value is TITLE. See Managing Citations.</td>
</tr>
<tr>
<td>recall_during_loan_prefer_oldest_loan</td>
<td>If there are multiple copies of an item, and multiple requests on the item, when the last copy is checked out, if there are still requests on the item, this parameter determines which loan to recall. Set to true to recall the oldest loan instead of recalling the item which is currently being loaned. Set to false, which is the default behavior, to recall the current loan.</td>
</tr>
<tr>
<td>remember_last_loan_display</td>
<td>Set to 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.</td>
</tr>
<tr>
<td>renew_all_loan_threshold</td>
<td>When higher than 0, the maximum number of loans that may be renewed simultaneously when selecting Renew All from Primo My Account. If the user attempts to renew more loans than the threshold, Alma returns a new error code, 0037, and an error message. 0 (default) indicates no limit on the number of loans that can be renewed at once.</td>
</tr>
<tr>
<td>Parameter Key</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>New for November! resource_locate_by_type</td>
<td>Determines the material types by which to locate resources. Possible values for this parameter are the material type codes defined in the Citation Material Type table.</td>
</tr>
<tr>
<td>New for November! resource_locate_mode</td>
<td>Determines the mode for locating a resource. If you set the value of this field to OR, then Leganto will locate citations based on any of the fields in the Locate Citations By Fields mapping table. If you set the value of this field to AND, then Leganto will locate citations based on all the fields in the Locate Citations By Fields mapping table.</td>
</tr>
<tr>
<td>resource_locate_multiple_matches</td>
<td>Default action for the Process and Enrich Citations in Bulk when multiple matches are found. Values: manually (default), or first_by_inventory_type. See Process and Enrich Citations in Bulk and the parameter resource_locate_multiple_matches_priority. Note: If you are using Leganto, this also determines the behavior for auto-locating resources for citations added by instructors.</td>
</tr>
<tr>
<td>resource_locate_multiple_matches_priority</td>
<td>When you select first_by_inventory_type for resource_locate_multiple_matches, set the priorities for matching using the values E (electronic), P (physical), and/or D (digital), in priority order, separated by commas. For example, E, P indicates first priority electronic, second priority physical, and not to consider digital matches. See Process and Enrich Citations in Bulk. Note: If you are using Leganto, this parameter also determines the behavior for auto-locating resources for citations added by instructors.</td>
</tr>
<tr>
<td>resource_sharing_protocol</td>
<td>The value displayed to an NCIP peer-to-peer partner when a Lookup Agency action is invoked from the partner's system. For more information, see the NCIP peer-to-peer parameters list on the Resource Sharing Request page.</td>
</tr>
<tr>
<td>results_best_location_enable</td>
<td>Set to true to prioritize the results list according to your location when using Get It and RTA services. The default setting is false.</td>
</tr>
<tr>
<td></td>
<td>For physical items, setting the value to true causes the holdings locations in the discovery system search results to be displayed according to the proximity of available items to the patron. The default value of false causes the holdings locations to be displayed according to availability without regard to the patron's physical location. Available items in temporary locations are displayed at the top, followed by those in permanent locations, and followed by those in remote locations. Alma is able to display the list of holdings locations in the discovery system search results according to the proximity of the patron by comparing the IP address of the patron with the IP addresses of libraries with holdings for the searched item. In order to utilize this functionality, libraries must be configured with IP addresses (see Configuring IP Ranges for a Library).</td>
</tr>
<tr>
<td>return_lost_loan_from_self_check</td>
<td>If false, and a check-in message is sent to Alma for an item that is currently declared lost, the return action is blocked and a message is displayed to the patron, directing him or her to a circulation desk. The default is true.</td>
</tr>
<tr>
<td>rl_auto_assign</td>
<td>Whether to automatically assign a reading list to a user who works on it. Set to all to automatically assign all lists to the user who works on them. Set to unassigned to automatically assign only unassigned lists. Set to none to disabled auto-assignment. See Editing a Reading List.</td>
</tr>
<tr>
<td>rs_add_currency_to_mashup_form</td>
<td>Set to false to suppress the currency on the Maximum Fee field label on the Primo resource sharing form. Set to true to display the currency on the Maximum Fee field label on the Primo resource sharing form.</td>
</tr>
<tr>
<td>Parameter Key</td>
<td>Description</td>
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<tr>
<td>---------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Parameter Key</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>assign</td>
<td>Requests Task List page), the request is assigned to the editing user only when selecting <strong>Reassign</strong> for the request. When selecting any other editing option, the request remains either on the <strong>Unassigned</strong> or <strong>Assigned to Others</strong> tab. Indicate <strong>false</strong> to ensure that selecting any editing option automatically assigns the request to the editing user (that is, the request moves to the <strong>Assigned to Me</strong> tab).</td>
</tr>
<tr>
<td>rs_display_items_not_requestable</td>
<td>Set to <strong>true</strong> to display items that are not requestable in the physical services list in <strong>Manage Fulfillment Options</strong> of lending requests. This is the default value. Set to <strong>false</strong> to suppress items that are not requestable.</td>
</tr>
<tr>
<td>rs_display_level_of_service</td>
<td>Set to <strong>true</strong> to display the level of service on the Primo request form.</td>
</tr>
<tr>
<td>rs_enable_lending_ship_warn_popup</td>
<td>Set to <strong>true</strong> to show a warning pop-up before automatically creating a lending request from a shipping item. Set to <strong>false</strong> to automatically create the request without the warning message. For more information, see <a href="#">Shipping Items</a>.</td>
</tr>
<tr>
<td>rs_external_id_prefix</td>
<td>This sets the external identifier format. Possible values are <strong>code</strong> or <strong>id</strong>. If set to <strong>code</strong>, the external ID is created as (institution code + a generated number) (as it was previously). If set to <strong>id</strong>, the external ID is created as (customer id + institution id + a generated number).</td>
</tr>
<tr>
<td>rs_fail_locate_multiple_results</td>
<td>Determines how to handle a locate that returns multiple results from the lender. When set to <strong>false</strong>, the locate returns one matching result randomly. When set to <strong>true</strong>, the locate fails due to the multiple results. See <a href="#">Lending Locate Process</a>.</td>
</tr>
<tr>
<td>rs_failure_note_need_dismiss</td>
<td>Determines the behavior of resource sharing requests that fail to send a message to the partner. When set to <strong>true</strong>, which is the default, the notes require manual dismissal. To eliminate the need to manually dismiss the notes, set the parameter to <strong>false</strong>.</td>
</tr>
<tr>
<td>rs_keep_rejected_request_active</td>
<td>This controls whether a resource sharing request stays active after it is rejected by the resource sharing partner. The valid values are <strong>None</strong>, <strong>Borrowing</strong>, <strong>Lending</strong>, and <strong>Both</strong>. When set to <strong>None</strong>, which is the default, the request is completed and is not visible in the active requests queue. For a rejected borrowing request, Alma also sends a cancelation message to the patron. When set to <strong>Borrowing</strong>, <strong>Lending</strong>, or <strong>Both</strong>, the request remains in the active requests queue of the appropriate task list so the staff librarian have the option to work on the request. For a rejected borrowing request, Alma does not send a cancelation message to the patron. For more information, see <a href="#">Rejecting a Borrowing Request</a> or <a href="#">Rejecting a Lending Request</a>.</td>
</tr>
<tr>
<td>rs_prefer_recall_method</td>
<td>Set to <strong>true</strong> to recall a shipped item first if a requested resource has copies that were shipped to a remote borrower and copies loaned to local patrons. For this function to work, the relevant workflow profile must also include the <strong>Recall item</strong> action. Set to <strong>false</strong> to recall the locally loaned copy first.</td>
</tr>
<tr>
<td>rs_specific_edition_only_default</td>
<td>Set to <strong>True</strong> (which is the default) to select the <strong>Specific Edition Only</strong> check box when opening the resource sharing request form in Primo.</td>
</tr>
<tr>
<td>rs_support_add_service</td>
<td>Set to <strong>true</strong> for the <strong>Alternative address</strong> field to display on resource sharing request forms.</td>
</tr>
</tbody>
</table>
| rs_uresolver_                     | Set to **true** to indicate that the locate process for electronic resources should consider coverage information similar to how[[523]](Ex Libris, a ProQuest Company)
<table>
<thead>
<tr>
<th>Parameter Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>locate</td>
<td>the Alma link resolver would find services. See Borrowing Locate Process.</td>
</tr>
<tr>
<td>rs_use_new_mashup_form</td>
<td>Set to true to enable the Resource Sharing Form Customization page on the Fulfillment Configuration menu. The default setting of false hides the Resource Sharing Form Customization page from the menu. For more information, see Customizing Primo Resource Sharing Forms.</td>
</tr>
<tr>
<td>rs_yearly_ill_limit_start_date</td>
<td>The first day of the year for consideration of the annual limit on resource sharing requests by a patron. The date format is DDMM and defaults to 0101. For more information, see Adding Fulfillment Policies.</td>
</tr>
<tr>
<td>rs_z39_locate_replace_amp</td>
<td>For resource sharing borrowing requests, when locating a resource at a partner configured with Locate Profile of type 'Z39.50' you can define how the '&amp;' sign is used in the title and author fields for the locate process. When set to NONE, which is the default, the '&amp;' sign remains in place and is not removed. When set to AND, it is replaced with &quot; AND &quot;. When set to BLANK, it is replaced with a space.</td>
</tr>
<tr>
<td>self_check_proxy_checkout</td>
<td>Set to true to enable automatic checkout to a sponsor at a self-check machine. If the user checking out is a proxy for a single sponsor and this is set to true, the item is checked out automatically to the sponsor. If the user is a proxy for more than one user, the existing behavior remains. The default setting of false retains the existing behavior.</td>
</tr>
<tr>
<td>send_courtesy_notices_and_handle_loan_renewals_last_run</td>
<td>The last run of the Notifications - Send Courtesy Notices and Handle Loan Renewals job. The parameter is automatically updated by the system after the job runs, and appears in the format YYYYMMDD_HHMMSS in UTC time. For example, if the job ran at 29/03/2020 13:21 and 26 seconds UTC time then the parameter would be automatically updated as 20200329_112126. If you want to manually update this parameter to a different date, use only the date. There is no need to also include the _HHMMSS. For example, if you change the parameter to 20201129, the job will run as if the last run date was on November 29, 2020.</td>
</tr>
<tr>
<td>send_courtesy_noticesBehaviour</td>
<td>Controls the behavior of the Automatic Renewal job (Notifications - Send Courtesy Notices and Handle Loan Renewals). The values are:</td>
</tr>
<tr>
<td></td>
<td>• DD_WITHIN_RANGE_DAILY - For institutions that previously had the resend_courtesy_notices parameter set to true, this value is populated in the new parameter as the default. The job runs on loans with a due date from the last run date until today plus the value of auto_renew_loan_days. This means multiple courtesy notices are sent if the loan is not renewed. For example, if the days parameter is set to 7 and the loan cannot be renewed (i.e. it is requested) then a reminder to the patron is sent every day until the day the item is due. It allows the notification to be sent daily until the item is due. This value corresponds to the Handle loans value of Daily when due date is within range on the Fulfillment Jobs Configuration page.</td>
</tr>
<tr>
<td></td>
<td>• DD_ON_EXACT_DEFINED_DAY - For all other institutions, this is the default value. The courtesy notice is sent only on the exact day based on the number of days before due date that the courtesy notice is set to send. The courtesy notice is not resent. This value corresponds to the Handle loans value of When due date exactly matches defined day on the Fulfillment Jobs Configuration page.</td>
</tr>
<tr>
<td></td>
<td>• DD_WITHIN_RANGE_ONCE - The courtesy notice is sent only once on or after the days before due date as defined in the job. This value corresponds to the Handle loans value of Once when due date is within range on the Fulfillment Jobs Configuration page.</td>
</tr>
<tr>
<td>send_query_</td>
<td>Set to true to replace the Patron Query Templates option on the Fulfillment Configuration menu with the Patron Query</td>
</tr>
<tr>
<td>Parameter Key</td>
<td>Description</td>
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<tr>
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</tr>
<tr>
<td>to_patiot_ use_xsl</td>
<td>Types option (see Configuring Patron Query Types), where you configure the types of queries to select from when sending a query to patron. The queries are sent using the enhanced XSL-based Query to Patron Letter. Set to false to enable the Patron Query Templates configuration option on the Fulfillment Configuration menu (see Configuring Patron Query Templates), where you configure the template to define the appearance of queries to be sent. False is deprecated.</td>
</tr>
<tr>
<td>short_loan_ courtesy_ reminder</td>
<td>The time, in minutes, before the due date time of a short loan to send a courtesy notice. The value must be less than 1440 minutes (24 hours). It is blank by default, which means no short loan courtesy notifications is sent.</td>
</tr>
<tr>
<td>short_loan_ overdue_ block</td>
<td>When set to true, an overdue letter results in an overdue block being applied to the patron’s account. By default, this parameter is set to false.</td>
</tr>
<tr>
<td>short_loan_ overdue_ reminder</td>
<td>The time, in minutes, after the due date time of a short loan to send an overdue reminder notice. The value must be less than 1440 minutes (24 hours). It is blank by default, which means no short loan overdue notifications is sent.</td>
</tr>
<tr>
<td>shortened_ due_date_ notifications</td>
<td>The possible values are NONE, MESSAGE, EMAIL, MESSAGE_EMAIL (in caps). The default is NONE meaning no notification is sent. If set to MESSAGE or MESSAGE_EMAIL, an on-screen alert is displayed for staff on the Manage Patron Services page when loaning or renewing an item with a shortened due date. The possible messages are:</td>
</tr>
<tr>
<td></td>
<td>• Please notice that the due date was shortened since the item is recalled</td>
</tr>
<tr>
<td></td>
<td>• Please notice that the due date was shortened since the patron card is expired before the due date</td>
</tr>
<tr>
<td></td>
<td>• Please notice that the due date was shortened since the loan conflicts with a booking request</td>
</tr>
<tr>
<td></td>
<td>When loaning an item from a self-check machine, a message is also displayed.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong></td>
</tr>
<tr>
<td></td>
<td>The message text is not configurable.</td>
</tr>
<tr>
<td></td>
<td>In addition, when set to EMAIL or MESSAGE_EMAIL, a notification is sent to the patron at the time of loan or renewal regarding the shortened due date. At renewal time, the letter is only triggered if the renewal is done by staff from the Manage Patron Services page. If the renewal is done by the patron in Primo, the shortened due date is displayed to the patron immediately. The Shortened Due Date Letter can be sent either by email or SMS. For letter information, see Configuring Alma Letters.</td>
</tr>
<tr>
<td>should_ anonymize_ borrowing_ request</td>
<td>Set to true to block viewing the patrons who have placed borrowing requests. Set to false to enable viewing this information. Changing this parameter affects the Anonymize resource sharing requests check box on the Anonymization Job parameters of the Fulfillment Jobs Configuration. Setting this to true selects the check box. Setting this to false clears the check box. See Configuring Anonymization, above.</td>
</tr>
<tr>
<td>should_ anonymize_ item_loan</td>
<td>Set to true to block viewing the patrons who have borrowed returned items. Set to false to enable viewing this information. Changing this parameter affects the Anonymize item loans check box on the Anonymization Job parameters of the Fulfillment Jobs Configuration. Setting this to true selects the check box. Setting this to false clears the check box. See Configuring Anonymization, above.</td>
</tr>
<tr>
<td>should_ anonymize_ requests</td>
<td>When set to true, the requester ID is set to NULL when a request is completed, therefore hiding the requester ID from the request history. This is the default. When set to false, the requester ID appears.</td>
</tr>
<tr>
<td>Parameter Key</td>
<td>Description</td>
</tr>
<tr>
<td>---------------</td>
<td>-------------</td>
</tr>
</tbody>
</table>
| should_automatically_print_request_slip | When set to **true**, print slips are generated automatically according to any Automatic Printing rules that have been configured.  
When set to **false**, print slips are NOT generated automatically, regardless of any Automatic Printing rules that have been configured. Note that you can still print request slips manually by selecting **Print Slip**.  
This is an institution-level parameter and, therefore, applies to all Automatic Printing rules in all circulation desks in all libraries. |
| should_report_active_requests | This value is set in the **Requests - Send Report** section of the [Configuring Fulfillment Jobs](#) page. When it is set to true, the active requests section appears in the notification report. |
| should_report_in_process_requests | This value is set in the **Requests - Send Report** section of the [Configuring Fulfillment Jobs](#) page. When it is set to true, the in process requests section appears in the notification report. |
| should_report_on_hold_shelf_requests | This value is set in the **Requests - Send Report** section of the [Configuring Fulfillment Jobs](#) page. When it is set to true, the hold shelf requests section appears in the notification report. |
| switch_to_overdue_and_lost_loan_new_job | Set to **true** to activate the option for aggregating overdue or lost item notifications so that the patron receives only one notification for each notification type. Setting this to true also displays the **Loans Overdue Notification Status Update** option on the **Fulfillment > Advanced Tools** menu.  
Set to **false** to send one notification for each overdue or lost item. When set to false, overdue blocks are not supported.  
For more information on the overdue and lost item letters, see **Loans – Overdue and Lost Item** on the Viewing Scheduled Jobs page. |
| uresolver_display_cz_records_first | Whether to list Community Zone records first in each level in the list of online resources. For more information, see [Configuring Online Services Order](#). |
| uresolver_enable_getit_holding_configuration | Set to **true** to display the Holdings Display Labels and Holdings Display Customization pages in the Discovery Interface Display Logic configuration menu.  
Additionally, when this parameter is set to **true**, the customer parameters **display_additional_holding_fields_in_getit** and **display_alternative_call_number_in_getit**, become obsolete.  
This field is set to **false** by default for existing customers prior to the May 2018 release. For customers who go live starting in the May 2018 release, it is set to **true** by default.  
For more information on the mapping tables, see [Configuring Holdings Display Labels](#) and [Configuring Primo Holdings Display](#).  
For more information on configuring holdings information, see [Displaying Additional Holdings Information](#). |
| uresolver_partial_digitization_default_value | Set to **true** to initialize the **Partial** check box to selected on the Digitization Request Form.  
Set to **false** to initialize the **Partial** check box to deselected on the Digitization Request Form. |
### Parameter Key Description

For more information on customizing the Digitization Request Form, see [Customizing Primo Request Forms](#).

<table>
<thead>
<tr>
<th>Parameter Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>uresolver_remote_register</td>
<td>This controls whether the other institution's holdings may be retrieved without creating a local linked patron record. Set to <strong>Auto</strong> to automatically create a linked account. This is the default. Set to <strong>None</strong> to disallow the option to create a linked account via the Get It. Only holdings information is shown. Set to <strong>Manual</strong> to display a link to sign into the institution. Selecting the link opens the request form from the source of the linked account. For more information, see <a href="#">Requesting From Other Institutions Without a Local Linked Patron</a>.</td>
</tr>
<tr>
<td>uresolver_use_source_to_target_ordering</td>
<td>Whether to place the highest priority on services that match the source of the OpenURL. For more information, see <a href="#">Configuring Online Services Order</a>.</td>
</tr>
<tr>
<td>use_time_format_with_time_zone_in_self_check</td>
<td>When <strong>false</strong>, the time zone is not included as part of the due date field in the self-check response message. When <strong>true</strong> (default), the due date is formatted according to the <code>system_time_format</code> parameter. For more information on the <code>system_time_format</code> parameter, see the mapping table in <a href="#">Configuring Other Settings</a>.</td>
</tr>
</tbody>
</table>

### Configuring Printers

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 connections of local or network printers. Instead, printing in Alma works using email or a printout queue. Printout queue is the preferred option though email printing is still supported (see [Printouts Queue](#)). Each library/institution must define the email addresses of its local printers in Alma, which route staff-oriented, Alma-originating e-mails (including request and transit slips) to the appropriate printer. The printing queue method is the preferred method when printing to a physical printer.

You configure printers on the Printers page ([Configuration Menu > Fulfillment > General > Printers](#)).

![Printers Page](#)
To associate a printer with a circulation desk, you must configure the printer at the library level. Ensure that you have selected a library in the Configuring filter on the Configuration page.

Select 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:

- Add a printer (see Adding a Printer)
- Edit a printer (see Editing Printer Information)
- Delete a printer (Select Delete from the row actions list)

## 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.

To associate a printer with a circulation desk, you must configure the printer at the library level. Ensure that you have selected a library in the Configuring filter on the Configuration page.

**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.

To add a printer:

1. On the Printers page (Configuration Menu > Fulfillment > General > Printers), select Add Printer.
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.
3. Select **Add and Close** to close the dialog box. The defined printer is added to the list of printers on the Printers page.

**Add Printer Dialog Box**

![Add Printer Dialog Box Image]

**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**.

---

**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 (Configuration Menu > Fulfillment > General > Printers), in the Code column, select the printer code link, or select Edit from the row actions list for the specific printer record whose information you want to update. The Edit Printer page opens.

2. Under Edit Printer, edit the general printer details as required. When you want print routed to a queue in addition to an email address, select the Printout Queue option. See Printouts Queue for more information. When the Printout Queue option is selected, an additional column appears (Online Queue) in the list of printers with a check mark to indicate that the Online Queue option is selected.

3. In the Served Circulation Desks List section, select a circulation desk that is served by the printer, and select Attach Circulation Desk. The selected circulation desk is added to the list of circulation desks that are served by the printer.

4. This section displays only when you are configuring a library (that is, you have selected a library in the Configuring filter on the Configuration page.

5. 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, select Remove to the right of the circulation desk.

6. In the Served Service Units List section, select the service unit that is served by the printer, and select Attach Service Unit. The selected service unit is added to the list of service units that are served by the printer.

7. 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, select Remove to the right of the service unit to be removed.

8. Select Save to store your changes to the printer information.

---

**Configuring Article and Book Form Mandatory Fields**

To configure mandatory fields in Alma resource sharing requests for 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 Alma 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 reading list citation forms, and when cataloging brief
You configure mandatory fields for Alma resource sharing request forms on the ArticleFormMandatoryFields Mapping Table and BookFormMandatoryFields Mapping Table pages (Configuration Menu > Fulfillment > General, select Article Form Mandatory Fields or Book Form Mandatory Fields):

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 Configuring filter on the 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:)
- 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.)

To configure mandatory fields for resource sharing request forms:

1. On the Mapping Table page for an article or a book (Configuration Menu > Fulfillment > General, select Article Form Mandatory Fields or Book Form Mandatory Fields), select Customize for the fields you want to be mandatory when configuring a resource sharing request.
2. In the Restriction Type column, select Mandatory.
   To restore a field to its default value, select Restore.
3. Select 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 (Configuration Menu > Fulfillment > General, select Article Form Mandatory Fields or Book Form Mandatory Fields), select Customize for the fields you want to arrange into a group.

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, select Restore.

3. Select 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 appears.
Configuring Copyright Management

For Leganto customers, also see Configuring Leganto Copyright-Related Procedures and Enabling Integration with the CCC.

Configuring Digitization and Copyright Rules

To configure digitization and copyright rules, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

When requests for digitization and/or copyright approval enter Alma, Alma checks digitization and copyright rules to determine how to handle the request. Each rule is checked in order; the first rule that evaluates to true is applied and all subsequent rules are ignored. Alma includes a default rule that is applied if all other rules fail. This rule can be modified.

You configure digitization and copyright rules on the Digitization Workflow Rules List page (Configuration Menu > Fulfillment > Copyright Management > Digitization and Copyright Rules). For more information about rules tables, see Rules Tables.

When a rule is applied, the rules determines:

- Whether the request requires manual approval or is automatically approved. When automatically approved, no task is added to the task list.
- Whether the request requires manual copyright clearance, or the copyright is assumed to be automatically approved. When automatically approved, no task is added to the task list.
- Whether, for the above manual approval tasks, digitization
  - Can continue while waiting for approval. Of course, the digitized contents cannot be added to the inventory or delivered before final approval is given.
  - Must wait until approval is given.
  - Is automatically approved. The purpose of this option is that a task is added to the task list with the status Approved. This is useful for recording purposes.
- Whether the delivery to the requester will be:
Each rule contains a number of clauses, all of which must evaluate to true in order for the rule to evaluate to true. There are three types of clauses:

- **Evaluation clause** - A property of the request is evaluated against a text or a value from a list.
- **Comparison clause** - A property of the request is evaluated in comparison to all other requests that have not been filtered out by a filter clause.
- **Filter clause** - This clause always evaluates to true. It is used to reduce the number of requests to which a comparison clause is evaluated. The operator and values for these clauses are ignored.

---

**Note**

- Clauses in a rule are not evaluated in order; all filter clauses are evaluated first. The remaining clauses are then evaluated in an internal order. Regardless, all clauses must evaluate to true in order for the rule to be applied.
- Clauses are not marked evaluation, comparison, or filter; see the below table for this information.

---

For example, you can configure a rule so that digitization requests for a single chapter pass through manual approval and copyright clearance, but are not added to the inventory; the digital file is sent directly to the patron. You can configure another rule so that full digitization requests pass through all steps: manual approval, copyright clearance, and added to the digital inventory.

The following actions can be performed on this page:

- Add a rule (see Adding a Digitization and Copyright Rule)
- Edit a rule (select **Edit** from the row actions list)
- Delete a rule (select **Delete** from the row actions list)

You cannot delete the default rule.

---

**Adding a Digitization and Copyright Rule**

The digitization and copyright rules that you define apply to all libraries within the institution.

**To add a new digitization and copyright rule:**

1. On the Digitization Workflow Rules List page (**Configuration Menu > Fulfillment > Copyright Management > Digitization and Copyright Rules**), select **Add Rule**. The Digitization Workflow Setup page appears.
2. In the **Digitization Workflow Rule Editor** section, enter a name (required) and description (optional) for the rule.

3. In the **Input Parameters** section, enter clauses for the rule. Each clause has a clause type (**Name**), **Operator**, and **Value**. A clause may look like `User group = Graduate student` or `Publication date contains 2010`. The clause list is as follows:

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Description</th>
<th>Operators</th>
<th>Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Article Title Exists</td>
<td>Comparison</td>
<td>Check if the requested article is already requested by another copyright clearance request. The article is identified by ISSN, volume, issue, and pages.</td>
<td>=</td>
<td>true, false</td>
</tr>
<tr>
<td>Articles in Issue</td>
<td>Evaluation</td>
<td>Check the total number of articles in the journal issue.</td>
<td>&gt;, =, &lt;, Not Equals</td>
<td>Number</td>
</tr>
<tr>
<td>Available in Electronic</td>
<td>Evaluation</td>
<td>Check if an electronic copy exists for the material.</td>
<td>=</td>
<td>true, false</td>
</tr>
<tr>
<td>Chapter Already Requested</td>
<td>Comparison</td>
<td>Check if the requested chapter is already requested by another copyright clearance request. The chapter is identified by ISBN.</td>
<td>=</td>
<td>true, false</td>
</tr>
<tr>
<td>Name</td>
<td>Type</td>
<td>Description</td>
<td>Operators</td>
<td>Values</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-----------</td>
<td>------------------------------------------------------------------------------</td>
<td>--------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Citation Material Type</td>
<td>Evaluation</td>
<td>Check the material type.</td>
<td></td>
<td>The current list of material types (for example, Abstract, Anthology, and so forth).</td>
</tr>
<tr>
<td>Copyright Agency Approval</td>
<td>Evaluation</td>
<td>Check regional copyright licensing agency approval for the material. Select all values for a valid match.</td>
<td>InList</td>
<td>Digital Approved, Scanning Approved, Digital Declined, Scanning Declined</td>
</tr>
<tr>
<td>Previously Approved</td>
<td>Comparison</td>
<td>Check if the requested material is already approved by another copyright clearance request. The material is identified by various factors, such as ISBN or ISSN.</td>
<td>Required, but has no effect</td>
<td>Required, but has no effect</td>
</tr>
<tr>
<td>Copyright Record Related to</td>
<td>Filter</td>
<td>Restricts comparison checks to existing copyright clearance requests that are associated with a course.</td>
<td>=</td>
<td>true, false</td>
</tr>
<tr>
<td>Course</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>In the Same Academic</td>
<td>Comparison</td>
<td>Check to see if requesting academic department is the same academic department to which the course belongs.</td>
<td>=</td>
<td>true, false</td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>In the Same Course</td>
<td>Filter</td>
<td>Restricts comparison checks to existing requests associated with the same course as the request. At least one of the following additional rules must be defined: Article Title Exists, Articles in Issue, Chapter Already Requested, Total Copyright Number of Chapters, Total Copyright Work Percentage.</td>
<td>=</td>
<td>true, false</td>
</tr>
<tr>
<td>Material Required Dates</td>
<td>Filter</td>
<td>Restricts comparison checks to existing requests that overlap the Date Available From/To date range of the request. If this date range is missing, use the course's date range. If there is no associated course, use today's date as the start date with no end date. At least one of the following additional rules must be defined: Article Title Exists, Articles in Issue, Chapter Already Requested, Total Copyright Number of Chapters, Total Copyright Work Percentage.</td>
<td>=</td>
<td>true, false</td>
</tr>
<tr>
<td>Name</td>
<td>Type</td>
<td>Description</td>
<td>Operators</td>
<td>Values</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-----------</td>
<td>-----------------------------------------------------------------------------</td>
<td>--------------------------------</td>
<td>-------------------------------</td>
</tr>
<tr>
<td>Percentage.</td>
<td></td>
<td>Percentage.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of Requests</td>
<td>Comparison</td>
<td>Compare the number of previous copyright clearance requests to a value. The number of requests considered are only those that evaluate to true according to the Time Span (In Calendar Years) clause.</td>
<td>&gt;, =, &lt;, Not Equals</td>
<td>Number</td>
</tr>
<tr>
<td>Partial Digitization</td>
<td>Evaluation</td>
<td>Evaluate whether this is a partial digitization request.</td>
<td>=, InList, Is Empty, Is Not Empty, Not Equals, NotInList, contains</td>
<td>true, false</td>
</tr>
<tr>
<td>Patron Status</td>
<td>Evaluation</td>
<td>Evaluate the requester's active status.</td>
<td>=, InList, Is Empty, Is Not Empty, Not Equals, NotInList, contains</td>
<td>Active, Inactive</td>
</tr>
<tr>
<td>Publication Date</td>
<td>Evaluation</td>
<td>Evaluate the publication status of the requested item.</td>
<td>&gt;, =, &lt;, Not Equals</td>
<td>Number</td>
</tr>
<tr>
<td>Publisher</td>
<td>Evaluation</td>
<td>Check the publisher against a pre-defined list of publishers. Enter the list of publishers in the Copyright Publishers code table (see <a href="#">Configuring Copyright Publishers</a>). Set the parameter publisher to check against all publishers.</td>
<td>=, All, InList, Is Empty, Is Not Empty, Not Equals, NotInList</td>
<td>Publisher</td>
</tr>
</tbody>
</table>

Ex Libris, a ProQuest Company
<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Description</th>
<th>Operators</th>
<th>Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request Type</td>
<td>Evaluation</td>
<td>Check the request type.</td>
<td>◦ contains</td>
<td>◦ Borrowing resource sharing digitization request</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>◦ = ◦ InList ◦ Is Empty ◦ Is Not Empty ◦ Not Equals ◦ NotInList ◦ contains</td>
<td>◦ Course related digitization</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>◦ Lending resource sharing digitization request</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>◦ Patron digitization</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>◦ Staff digitization</td>
</tr>
<tr>
<td>Required Pages</td>
<td>Evaluation</td>
<td>Check the number of pages requested by the current request.</td>
<td>◦ &gt; ◦ = ◦ &lt; ◦ Not Equals</td>
<td>Number</td>
</tr>
<tr>
<td>Resource Total Pages</td>
<td>Evaluation</td>
<td>Check the total number of pages of the entire work (how many total pages are in the item being requested).</td>
<td></td>
<td>Number</td>
</tr>
<tr>
<td>Time Span (In Calendar Years)</td>
<td>Evaluation</td>
<td>Check that the request was made within / before the indicated number of years. This value also acts as a filter clause for the Number of Requests clause.</td>
<td>◦ &gt; ◦ &lt;</td>
<td>Number</td>
</tr>
<tr>
<td>Total Copyright Number of Chapters</td>
<td>Comparison</td>
<td>Check the total number of chapters requested, including previous requests. Alma looks at the ISBN, then looks at all outstanding and overlapping requests with the same ISBN, extracts which chapters are being / have been requested, and sums them up to get this value.</td>
<td>◦ &gt; ◦ = ◦ &lt; ◦ Not Equals</td>
<td>Number</td>
</tr>
<tr>
<td>Total Copyright Work Percentage</td>
<td>Comparison</td>
<td>Check the percentage of the work requested, including previous requests. Alma looks at the ISBN, then looks at all outstanding and overlapping requests with the same ISBN, extracts which pages are being / have been requested, and sums them up to get this value.</td>
<td>◦ &gt; ◦ = ◦ &lt; ◦ Not</td>
<td>Number between 0 and 100</td>
</tr>
</tbody>
</table>
### Table: User Group Evaluation

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Description</th>
<th>Operators</th>
<th>Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Group</td>
<td>Evaluation</td>
<td>Evaluate the user group of the requester. The list of values includes all user groups.</td>
<td></td>
<td>A user group</td>
</tr>
</tbody>
</table>

**Example:**

- **Clauses:**
  - Total Copyright Work Percentage < 10 Material
  - Material Required Dates = True
  - Request Type = Course related digitization
  - Copyright Record Related to Course = True

**Existing, Previous Request:**

- Dates 1/1/2016 - 30/1/2016
- Pages 15-20 (6 pages)
- Status Approved

- **New Request 1:**
  - Dates 10/1/2016 - 2/2/2016
  - Pages 35-40 (6 pages)
  - Total Resource Pages 220

**Expected Result:** Rule is applied, because total percentage is still less than 10% (12 pages / 220 in resource)

- **New Request 2:**
  - Dates 15/1/2016 - 3/2/2016
  - Pages 40-60 (21 pages)
  - Total Resource Pages 220

**Expected Result:** Rule is not applied, because total percentage for same item is now over 10% (27 pages / 220 pages in resource)

4. Select **Add Parameter.** The clause is added to the rule.
5. Repeat the previous two steps to add additional clauses.

6. Under **Workflow Setup**, select the digitization target. For more information, see [Digitization Processing](#).
   - **Digital inventory (representation)** – The digitized files are added to titles. Enter the following additional fields:
     - **Active / Inactive** – determines if the representation is discoverable.
     - **Default Collection** – The default collection to which to assign the title (if not already assigned).
     - **Usage Type** – Whether the representation is the Master copy or a Derivative. (The master is the original copy and the derivative is, for example, a copy with a lower resolution.)
     - **Access Rights Policy** – The policy that defines the permissions that patrons have to request digital resources.

   - **Document delivery - attachment** – 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](#).

   - **Document delivery - link** – Allows the operator to upload files to an document storage folder and send the file link to the patron. If multiple files are uploaded, they are stored in the folder as a .zip file and will download to the customer as a .zip file. When this option is selected, another field appears, **Maximum views**. Enter the number of times the patron may access this link before it is automatically deleted from the server. Note that if no value is entered in this field, the file link will not be sent to the patron.

   Note that if this option is used for resource sharing requests, and the borrowing partner is not a member of the same network zone as the lender institution (or there is no network zone set up for the institutions) then it is required to configure the Institution Code on the borrower partner record of the borrower. The field must be populated with the borrower's institution code. See [Resource Sharing Partners](#).

7. Under **Approval/Copyright Clearance Processing**, select:
   - **Approval** – The request requires approval by a user with the Digital Approval Operator role.
   - **Copyright clearance** – The request requires copyright clearance by the Digitization Manager.

8. If you select either of the two previous options, select how the approval affects the digitization workflow:
   - **In parallel to digitization workflow** – The digitization workflow is activated without waiting for the approval task to be approved, but does not finish until the approval task is approved. This is the default option.
     - The representation is handled as follows:
       - While the request is being processed, the representation is marked as inactive.
       - If the request is approved, the representation is marked as active.
       - If the request is rejected, the representation is deleted.

   - **Blocks digitization workflow** – The request workflow is activated only after the approval is completed.
   - **Automatically approved** – A new approval task is created as Approved, and the request workflow continues.

   Select an approval reason from the drop-down list. For the list of reasons, see [Approving/Rejecting a Request for Digitization](#).
9. (Leganto only) Select **Submit CLA/DCS Request** to automatically send a request to the DCS when this rule triggers. For more information, see [Integrating with the UK’s Digital Content Store (DCS)](#).

10. Select **Save** to store the new rule.

If you define 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 uses the default rule.

---

**Configuring Access Rights Policies for Digital Objects**

To configure access rights, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Access rights define the conditions that must be fulfilled in order for patrons to access digital resources. If no access rights policy is assigned to a digital object, access is denied or allowed depending on the setting of the configuration parameter **access_right_default_policy**. For more information, see [Configuring Other Settings](#). For an overview of digital resources, see [Working with Digital Resources - Overview](#).

You can define rules for access rights that restrict patron access to specific digital objects. These policies are available to apply when configuring a representation (see [Editing Representation Metadata and Content](#)), when configuring a digital import profile (see [Creating/Editing a Digital Import Profile: Bibliographic Record Level](#)), or when running a job on digital titles (see [Global Representation Changes](#)).

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 (Configuration Menu > Fulfillment > Copyright Management > Access Rights). Access rights can be configured at the institution level only.

![Access Rights Policy List Page](#)

**Access Rights Policy List Page**

**Note**

Access rights can be configured at the institution level only. Select the required institution from the **Configuring** filter on the Fulfillment Configuration page.

The following actions can be performed on this page:

- Add access rights policies, including configuring rules to restrict access to specific digital resources (see [Adding an Access Rights Policy List Page](#)).
**Access Rights Policy**

- Edit access rights (select **Edit** from the row actions list)
- Duplicate an access rights policy (select **Duplicate** from the row actions list and modify the relevant fields)
- Delete an access rights policy (select **Delete** from the row actions list)
- Find related digital titles with the same access rights

**Adding an Access Rights Policy**

The access rights policies that you define apply to the entire institution.

**To add an access rights policy:**


   ![Access Rights Policy Page](image)

2. Enter a name for the access rights policy (mandatory).

3. In **Copyrights**, select a copyright declaration to associate with the access rights policy. When a user requests to view the object, this declaration appears. For information on configuring copyrights, see Configuring Digital Resource Copyright Declarations. To have the copyrights declaration appear before a user can view the object, select **Obtrusive Copyrights**.

   **Note**

   Only copyright declarations in the /copyrights folder are available to select here.

   For a video describing this feature see Display Copyrights by Default.

4. Enter a description.

5. In the **Denied Note** field, enter the default note you want to appear when access is denied.

6. Select **Add Rule**. The Access Rights Rule page appears. For more information about rules tables, see Rules Tables.
1. Enter a name (mandatory) and a description (optional) for the rule.

2. Under **Expressions**, select **Add Parameter** and specify the components of the parameter (**Name**, **Operator**, and **Value**). A parameter may look like this: \textit{User group} = \textit{Graduate student} or \textit{Embargo before 31/12/2010}.

The available **Name** parameters include the following:

- **Concurrent User** – Access is permitted for the number of users in the specified time frame.
- **DNS** – Access is permitted only for the specified domain name. The value must contain a valid regular expression, for example: /.*google(bot)?\.com$/
- **Embargo** – Access is denied relative to a specified date. Select one of the following values for the base date:
  - Additional Publication Year
  - Fixed Date
  - MMS Creation Date
  - Publication Year
  - Representation Creation Date
  Enter a number of additional weeks, months, or years to add to the base date. The object assigned this policy is not accessible until the specified date.
- **IP Range** – Access is permitted/denied based on the specified IP address or range of addresses. Select = or **Not Equals** and enter one of the following values.
  - 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)
- **Leganto User** – Access is permitted/denied based on whether the user is a Leganto user (has logged in to Leganto at least once). Select = and select **True** or **False** for the value.
- **Registered** – Access is permitted/denied based on whether the user is registered and authenticated (\(\text{= True}\) is the same as **Not Equals False**).
- Restricted For All –
- **User Group** – Access is permitted/denied based on the specified user group. Select an operator and then (depending on the operator) select one or multiple user groups. Note: When using this condition with a 'not
in’ operator, it is recommended to add a ‘Registered=True’ condition if guest access should be prevented.

- **User ID** – Access is permitted/denied based on the primary user identifier. Select an operator and enter a matching ID.
  Note: For InList and NotInList operators, use the comma (,) as the delimiter to separate between the IDs.

3. Select **Add Parameter**. The parameter is added to the list of parameters for the access rights rule.

4. Repeat the previous two steps to add all the required parameters for the rule.

---

**Note**

All of the parameters must be fulfilled in order for the rule to be applied. If all of the parameters are not fulfilled, the default rule is applied.

---

5. Under **Output**, clear the **Allow Download** check box to prevent the display of the Download button in the viewer.

6. Select **Save** to save the rule.

7. Repeat the steps for adding a rule to add all of the required rules to the policy.

   If you define more than one rule, the order of the rules is important: only the first (and only the first) appropriate, enabled rule applies. If no appropriate rule is found, the default rule (**If no match**) applies.

8. Select **Save** to save the policy.

---

**Configuring Digital Resource Copyright Declarations**

To configure digital resource copyright declarations, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can configure digital resource copyright declaration to display to a user before displaying the digital resources. You configure the copyright declarations on the Copyright Declarations Configuration Files page ([Configuration Menu > Fulfillment > Copyright Management > Copyright Declarations](#)).

---

**Copyright Declarations**

The declarations are defined as follows:
<table>
<thead>
<tr>
<th>Form Name</th>
<th>File Name</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digitization Request Copyright Declaration form</td>
<td>DigitizationRequestCopyrightDeclaration.html</td>
<td>This declaration is displayed on the Primo digitization request form.</td>
</tr>
<tr>
<td>Resource Sharing Copyrights form</td>
<td>resourceSharingCopyrights.html</td>
<td>This declaration is displayed on the Primo resource sharing request form.</td>
</tr>
<tr>
<td>Leganto Digitization Request Copyright Declaration form</td>
<td>LegantoDigitizationRequestCopyrightDeclaration.html</td>
<td>This declaration is displayed in Leganto to students attempting to access citation materials.</td>
</tr>
<tr>
<td>Copyrights 1-5</td>
<td>copyrights1.html, copyrights2.html, etc.</td>
<td>Depending on the configured access rights, this declaration is displayed when a digital resource is shown in Primo.</td>
</tr>
</tbody>
</table>

**Note**

- Copyright declarations do not support HTML tags.
- It is possible to create declarations in different languages other than the default language. In each case, a language must be preceded by the following syntax: `--<language code>---` For example: `--fr--`

**To configure copyright declarations:**

1. On the Copyright Declarations Configuration Files page, select **Customize** for a declaration. The following, for example, appears:

   ![Configuration File](image)

   **Copyright Declaration**
2. Edit the copyright declaration, if you want, and select Customize.

After you edit a copyright declaration the following actions are available:

- **Edit** – Edit the copyright declaration
- **Restore** – Restore the copyright declaration to the default
- **View Default** – View the default copyright declaration

---

**Note**

The example shown above is the Digitization Request Copyrights Declaration. Entering content in this form causes a check box to appear in Primo that requests patrons to confirm that they have read the copyright agreement before submitting a Primo digitization request form.

---

**Configuring a Resource Sharing Copyright Declaration**

To configure a resource sharing copyright declaration, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

See also [Configuring Resource Sharing Copyright Statuses](#).

You can configure a resource sharing copyright declaration that is displayed to patrons before they request an item from a partner.

You configure the declaration on the Configuration File page (Configuration Menu > Fulfillment > Copyright Management > Resource Sharing Copyright Declaration).

![Resource Sharing Copyright Declaration Configuration File Page](image)

**Note**

A resource sharing copyright declaration can be configured at the institution level only. Select the required institution from the **Configuring** filter on the Configuration page.
To enter a resource sharing copyright declaration:

1. In the **Content** field, enter the text that you want to display to patrons.
2. From the **Enabled** drop-down list, select **Yes**.
3. Select **Customize** to store the declaration in the system.

---

**Configuring Copyright Publishers**

To configure copyright publishers, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can create a list of publishers against which to compare the publishers associated with digitization requests. These comparisons can be used in digitization and copyright rules during automatic copyright approval (see [Adding a Digitization and Copyright Rule](#)). The list of publishers in the Copyright Publishers code table ([Configuration Menu > Fulfillment > Copyright Management > Copyright Publishers](#)). For more information about code tables, see [Code Tables](#).

![Copyright Publishers Code Table](#)

---

**Configuring the Citation Default Copyright Status**

To configure the default copyright status of reading list citations, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can configure the default copyright status for all reading list citations on the Citations Copyright Default Status mapping table ([Configuration Menu > Fulfillment > Copyright Management > Citation Default Copyright Status](#)). For more information about working with mapping tables, see [Mapping Tables](#).
This default can differ for repository (digital, electronic, or physical), non-repository, and brief citations.

The status you select appears as the default value for Copyright status when creating a new reading list citation, such as on the Add Non-Repository Citation Page. For more information, see Adding Citations to a Reading List.

Configuring Resource Sharing Copyright Statuses

To configure the copyright statuses, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

See also Configuring a Resource Sharing Copyright Declaration.

You can configure the descriptions for the resource sharing copyright statuses on the Resource Sharing Copyright Statuses code table (Configuration Menu > Fulfillment > Resource Sharing > Copyright Status). This option appears only if the parameter rs_borrower_copyright_management is set to true (see Configuring Other Settings). For more information about code tables, see Code Tables.
Resource Sharing Copyright Statuses

You can only change descriptions on this page. You cannot add, remove, enable, or disable statuses.
Advanced Tools

This section includes:

- Viewing Fulfillment Configuration Information
- Managing Fulfillment Sets
- Changing Loan Due Dates in Bulk
- Viewing Restore Request Jobs
- Viewing Overdue and Lost Loan Jobs
- Offline Circulation
- Items Requiring Action
- Transferring All Requests to a Different Circulation Desk
- Creating Fines and Fees Reports
- Distributing Fulfillment Network Configuration
- Distributing Resource Sharing Network Configuration
- Process and Enrich Citations in Bulk
- Resending Printouts and Emails
- Finding Alternate Resource Suggestions for Citations
Viewing Fulfillment Configuration Information

To view fulfillment configuration information, you must have one of the following roles:

- Fulfillment Services Manager
- Fulfillment Administrator
- General System 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 Terms of Use 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.

In addition to the Terms of Use details that are displayed for a loan, the **Request** and **Booking** tabs display the Terms of Use details that would be associated with requests or bookings. The **Overdue and Lost Loan Profiles** tab displays the applicable overdue and lost loan profiles for a given overdue loan.

You can also access this information when viewing a patron's loan information on the Patron Services page, by selecting **View Policies** from the row actions list for a loan (see Loaning Items).

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.

2. In the Item barcode field, search for an item. After selecting an item, the item’s barcode displays in this field.

3. Select OK. The due date for the specified item and patron appears next to Due date if the item would be loaned now, and the Terms of Use for the item and patron appears on the bottom of the page.

4. In the Optional Return Date field, enter a date and time to return the item and select Calculate Overdue Fine. The Overdue fine for given return date appears. If the item is not currently on loan, the amount indicates the fine that would be accrued if the item were returned on the indicated date and time. If the item is currently on loan, the overdue fine is calculated based on the current loan date.
5. Optionally, you can perform the following actions for the item:

- Select the link next to **Fulfillment Unit Name** to view and edit the item's fulfillment unit.
- Select the link next to **Fulfillment Unit Rule** to view and edit the item's fulfillment unit rule.
- Select the link next to **Terms of Use Name** to view and edit the item's Terms of Use.
- Select the **Request** tab to view the applicable policies to a request for the selected item by the selected user.
- Select the **Booking** tab to view the applicable policies to a booking request for the selected item by the selected user.
- Select the **Overdue and Lost Loan Profiles** tab to view the applicable overdue and lost loan profiles for a given overdue loan.

**Note**

The 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

To create itemized physical sets based on their loan status, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator
- Requests Operator

For information about this page, see To create itemized physical item sets based on their loan status in Creating Itemized Sets.

For information on Viewing Sets, see Viewing and Removing Members of Itemized Sets.
Changing Loan Due Dates in Bulk

To change due dates in bulk, you must have one of the following roles:

- Fulfillment Administrator
- General System 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) with a job that runs on demand. This process is applied to loans for which the status is active and is not recalled. There are no other restrictions for changing the due date based on the status.

If there is an accruing fine for a loan that is overdue, and the due date is changed so that the loan is no longer overdue, the fine will be dismissed. It will not be charged when item is returned. This behavior is determined by the `overdue_at_change_due_date` parameter. See Configuring Other Settings.

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.

![Bulk Change Due Date Page]

### Bulk Change Due Date Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Library</td>
<td>Select the library whose items’ due dates you want to change.</td>
</tr>
<tr>
<td>Material type</td>
<td>Select a type of item within the specified library. If no material type is selected, the job handles all material types.</td>
</tr>
<tr>
<td>User group</td>
<td>Select a user group for which you want to change the due date. If no user group is selected, the job handles all user group.</td>
</tr>
</tbody>
</table>

Ex Libris, a ProQuest Company
Field | Description
--- | ---
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.

New due date (Required) | Select the new To due date 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.

2. Select Change Bulk Due Date, and select Confirm in the confirmation dialog box. The list of jobs and their statuses appear in the table on the bottom of the page.

The Bulk Change Due Date page displays the columns containing information on the bulk change jobs that have run. The columns are described in the following table:

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job ID</td>
<td>A numerical identification number of the job</td>
</tr>
<tr>
<td>Status</td>
<td>The status of the job</td>
</tr>
<tr>
<td>Creator</td>
<td>The user who created the job</td>
</tr>
<tr>
<td>Time Started</td>
<td>The date and time on which the job started</td>
</tr>
<tr>
<td>Time Ended</td>
<td>The date and time on which the job ended</td>
</tr>
<tr>
<td>Entities Finished</td>
<td>The number of items in the job for which the due date change completed successfully</td>
</tr>
<tr>
<td>Entities Failed</td>
<td>The number of items in the job for which the due date change failed</td>
</tr>
</tbody>
</table>

Select View to view a report of the job. The Job Report page appears, displaying job details.
Select Export to Excel to export the report data to Excel for analysis.

Note

Changing a due date for one user’s loans manually will create only a single Loan Status Letter for all affected loans. Changing a due date in bulk will send the letter out once per affected loan, meaning that users with multiple loans will get multiple letters. For more information on customizing letters, see Configuring Alma Letters.

A Bulk Change Due Date demand job is one method that can be used when due dates extend beyond the end of a semester and must be shortened to the end of the semester. For more information, see How to Add or Modify an "End of Term" Event For a Fixed Due Date in Alma.
Viewing Restore Request Jobs

To view jobs that restore items that were temporarily moved, you must have one of the following roles:

- Fulfillment Administrator
- General System Administrator

The job [Requests - Restore Temporary Shelved Items](#) 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 as a resource that was removed while a course is ongoing and the resource is now due to be returned

The list of jobs appears on the List of Restore Jobs page. For information on configuring this job, see [Configuring Fulfillment Jobs](#).

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.

  ![Job Report Page](#)

- **Events** – Opens the Events Report page, displaying details of the events that occurred during the job processing.

  ![Events Report](#)
Viewing Overdue and Lost Loan Jobs

To view lost loan jobs, you must have the following role:

- Fulfillment Administrator
- General System Administrator

You can view and monitor the created lost loan jobs.

To view lost loan job details:

- As a General System Administrator - Locate the relevant completed Loans - Overdue and Lost Item job in the list of all completed jobs. For more information, see Viewing Completed Jobs.

- As either a General System Administrator or a Fulfillment Administrator - On the List of Change Loan to Lost Job page (Fulfillment > Advanced Tools > View Overdue and Lost Loan Jobs), select View on the job you want to view.

For information about the report, see Viewing Lost Loan Job Report.
Offline Circulation

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, using the offline circulation utility (see Downloading the Offline Circulation Utility below). 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. The data file format is detailed below (see The Offline Circulation File).

Note

- The Offline Circulation List page is available only when you are logged in to a circulation desk. Ensure that you are at the correct circulation desk before you begin uploading the file.
- Ensure that you install the offline circulation utility in a location in which it won’t get deleted (for example, by a workstation reboot that removes all local data files).
- Because loans are created when the file is uploaded, the due date is calculated from the Terms of Use based on the upload date. Due dates cannot be in the past for offline transactions.
- If a loan and return for an item are being uploaded at the same time, they must be in the same file in the order that the transactions took place.
- Due to a known issue, before you upload the data file that contains the offline loan and return transactions, ensure that the Item is currently on loan by another patron block in Block Preferences is not set to Handle Automatically. Failure to change this option may cause data inconsistencies. After the offline circulation process has been run, the block value should be set back to Handle Automatically if it was set to this option before the data file was uploaded.

<table>
<thead>
<tr>
<th>Name</th>
<th>Date modified</th>
<th>Type</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offline Circulation</td>
<td>10/9/2012 4:25 PM</td>
<td>Shortcut</td>
<td>1 KB</td>
</tr>
<tr>
<td>UnInstall</td>
<td>10/9/2012 4:25 PM</td>
<td>Shortcut</td>
<td>1 KB</td>
</tr>
</tbody>
</table>

Offline Circulation List Page

To upload offline loans and returns:

1. On the Offline Circulation List page (Fulfillment > Advanced Tools > Offline Circulation), select 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 appears in the File name field.
2. Select **Upload and Validate File Content**. The job appears in the table at the bottom of the page. Its status appears in the **Status** column.

When returning an item, the item is put into **Processing** status for the hold shelf, regardless of the specific desk configuration. An additional scan-in is required to place the item on the hold shelf and send the notification to the patron.

**Downloading the Offline Circulation Utility**

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 (see above procedure).

The offline circulation utility can be downloaded from [https://developers.exlibrisgroup.com/blog/alma-offline-circulation/](https://developers.exlibrisgroup.com/blog/alma-offline-circulation/).
Install the offline circulation utility using the Alma offline circulation Utility wizard (requires Administrator privileges). By default, the utility is installed in the C:\Alma Offline Circulation directory.

<table>
<thead>
<tr>
<th>Name</th>
<th>Date modified</th>
<th>Type</th>
<th>Size</th>
</tr>
</thead>
<tbody>
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<td>Uninstall</td>
<td>10/9/2012 4:25 PM</td>
<td>Shortcut</td>
<td>1 KB</td>
</tr>
</tbody>
</table>

Offline Circulation

After you have downloaded the offline circulation utility, you can perform loans and returns offline.

To perform loans and returns offline:

1. Select the Offline Circulation file in the C:\Alma Offline Circulation directory to run the utility. The following dialog box appears.

   ![Offline Circulation Interface]

   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. Select Loan or Return to complete the transaction.
5. When all the transactions are completed, select 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, the data files can be uploaded 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 List page and are processed into Alma again during the next upload.

The Offline Circulation File

This client tracks four key pieces of information:

- What date/time the transaction took place
- Whether the transaction was a loan or a return
- The patron’s ID (usually patron barcode or username)
- The item’s ID (item barcode)

The offline circulation file a delimited text file, stored in the following format:

Col.1 = date (YYYYMMDDHHMM) [12 chars] + L (Loan) or R (Return) [1 char] + item-barcode [80 chars]

Col.2 = patron ID

For example:

201401011239L33031245 JohnSmith
Items Requiring Action

To run the Items Requiring Action job, you must have one of the following roles:

- Requests Operator
- Fulfillment Services Manager
- Fulfillment Services Operator

Using a hand-held scanning device, you can scan items on your shelves and receive a beep when the scanned barcode has some condition, for example: is marked missing, is marked on loan, and so forth. To do this, you must upload a file generated by Alma to your scanning device. The generated file is not designed for a specific device, and can be used by any such scanning device.

You generate and export these files on the Items Requiring Action page (Fulfillment > Advanced Tools > Items Requiring Action). The file is created according to criteria you define and is uploaded to an FTP site using the FTP connection that you specify. A separate file is created for each library and type of criteria. The code of the library and criteria are included in the file name. After exporting the file from Alma, you must import the files to your device (which is not covered in this documentation).

To create a file of items requiring action:

1. On the Items Requiring Action page, enter the following information.
   - **S/FTP connection type** – Select a connection type from a predefined list (see Configuring S/FTP Connections). Note that the connection type selected must have a subdirectory defined.
   - **Items that do not belong to the current library** – When selecting this option, the Library field appears, enabling you to select a library. Items that belong to the selected library are included in the file.

      Select the required criteria that will cause the scanner to beep.

      - **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**

2. Select **OK** to create a job that exports the files. The job appears in the table at the bottom of the page.
The files created by the job are uploaded to the FTP server.
Transferring All Requests to a Different Circulation Desk

To run the Transfer Requests job, you must have the following role:

- Fulfillment Administrator

You can move requests from a circulation desk to a different circulation desk in the same library on the Transfer Requests page. All request process types are 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.
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. Select Run, and select Confirm in the confirmation dialog box. The job appears in the table on the Transfer Requests page.

5. Select Refresh to update the job status. When completed, the number of entities that transferred successfully and unsuccessfully appear 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.
Creating Fines and Fees Reports

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 the prior 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, select **Create Fines and Fees Report**.

   The Create Fines and Fees Report page appears.

   ![Create Fines and Fees Report Page](image)

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.
3. Specify any of the filters listed above and the destination of the report (Printer or User).

4. Select Run Now.

The report is sent to the specified report receiver.

### Sample Fines and Fees Report

<table>
<thead>
<tr>
<th>Date</th>
<th>Name</th>
<th>Amount</th>
<th>Charge Type</th>
<th>Library</th>
<th>Time</th>
<th>Email</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>2023-01-25</td>
<td>John Smith</td>
<td>$50</td>
<td>Library late fee</td>
<td>Main Library</td>
<td>12:00 PM</td>
<td><a href="mailto:john.smith@library.com">john.smith@library.com</a></td>
<td>Email</td>
</tr>
<tr>
<td>2023-02-01</td>
<td>Jane Doe</td>
<td>$30</td>
<td>Library late fee</td>
<td>Main Library</td>
<td>3:00 PM</td>
<td><a href="mailto:jane.doe@library.com">jane.doe@library.com</a></td>
<td>Email</td>
</tr>
</tbody>
</table>

Note: If you specify more than a 7-day period, an error message appears.
Distributing Fulfillment Network Configuration

See Configuring Fulfillment Information in the Network Zone.
Distributing Resource Sharing Network Configuration

See Configuring Fulfillment Information in the Network Zone.
Process and Enrich Citations in Bulk

To run the process and enrich citations job, you must have one of the following permissions with an institution-wide scope:

- Fulfillment Services Operator/Manager
- Fulfillment Administrator
- General System Administrator

When citations are added to reading lists, they are usually matched automatically to physical inventory if a single match can be found. Alma does not automatically match citations if this feature is turned off, or if there are no matches, or multiple matches, for a citation. For more information, see Managing a Citation's Attachment to an Inventory Item.

See also Finding Alternate Resource Suggestions for Citations.

You can match inventory to citations in bulk by running the Process and Enrich Citations page (Fulfillment > Advanced Tools > Bulk Citation Inventory Enrichment). This job can also be used to validate URL citations.

Bulk Citation Inventory Enrichment Job Page

On this page, you can match all citations in courses starting on or after a certain date and ending on or before a certain date.

You can add optional criteria:

- A specific course
- Reading lists with a specific status
- Citations with a specific status
- Select the types of processes to run on the citations:

  - Resource locate repository - This does a "resource locate" process by trying to find the citation in the repository and assign an MMS ID to the citation. If you select Handle manually, multiple matches are noted in the job report but the citation remains unlinked to any repository entity. If you select Use first matching resource, the first
matching resource of the type you select (in priority order) is used when there are multiple matches. If this fails, the citation remains unmatched.

| Physical | Library | Electronic | Library | Online | Private
|----------|---------|------------|---------|--------|--------|

Bulk Citation Inventory Enrichment Job Page - Match Priority

Note that you see an error message if you select the same value for more than one of the resource types. To set defaults for the above fields, see the parameters resource_locate_multiple_matches and resource_locate_multiple_matches_priority in Configuring Other Settings.

- New for November! **Perform locate on type** - Indicate which material types to perform the locate action on. Automatically populates with the type selected in the Other Settings table (see Configuring Other Settings).

- **Resource locate: link resolver** - For electronic resources, this tries to resolve the citation using the citation metadata and the Alma link resolver. The locate attempts to match the citation metadata to a bibliographic record, and if a match is found, it checks to see if the library has available inventory for that bibliographic record. If it does, locate is successful.

- **Validate external links** - For URL citations, this attempts to access the URL and checks for a valid HTTP response.

To match citation to inventory in bulk:

1. On the Citation Inventory Enrichment job page, select the dates for the courses whose citations you want to match to inventory. All courses that start on or after and end before the date you select inCourse Start/End date will be processed.

2. Optionally select additional matching criteria and processing types for the citations.

3. Select **Run Process and Enrich Citations Job** and select confirm in the confirmation dialog box. The job starts.

---

**Note**

- The job also (re)connects to inventory any citations that were manually disconnected from inventory.
- For more information, see Managing a Citation's Attachment to an Inventory Item.

Information about the running job appears on this page, as well as on the Running/History tabs of the Monitor Jobs page (see Viewing Running Jobs). Select Refresh to update the page.

When the job completes, select View Report to see the job's report. The job report includes the number of records processed and how many match attempts succeeded or failed.
Resending Printouts and Emails

To resend printouts and emails, you must have one of the following permissions:

- Fulfillment Administrator
- General System Administrator

The Resend Printouts/Emails page (Fulfillment > Advanced Tools > Resend Printouts/Emails) enables you to resend printouts or emails from the attachments that were sent previously.

![Resend Printouts/Emails Page](image)

The run parameters include:

- **From Date** - Resend letters only starting from this date. This field is required.
- **To Date** - Resend letters only up to this date. This field is required.
- **Printer Owner** - Resend letters only for this institution/library.
- **Printer Name** - Select the printer to which to write the letters.
- **Job ID** - Only resend letters matching this job ID. You can find the job ID in the Monitor Jobs page on the History tab. See [Viewing Completed Jobs](#).
- **Printout/Email Type** - Only resend letters of this type:
  - Borrowed By Letter (FulBorrowedByLetter)
  - Borrower Overdue Email Letter (BorrowerOverdueEmailLetter)
  - Borrowing Activity Letter (FulUserBorrowingActivityLetter)
  - Courtesy Letter (FulUserLoansCourtesyLetter)
  - Document Delivery Notification Letter (FulDigitizationDocumentDeliveryNotificationLetter)
  - Fine Fee Payment Receipt Letter (FineFeePaymentReceiptLetter)
  - Fines And Fees Report Letter (FinesAndFeesReportLetter)
  - Ful Borrowing Info Letter (FulBorrowingInfoLetter)
  - Ful Cancel Email Letter (FulCancelEmailLetter)
  - Ful Cancel Request Letter (FulCancelRequestLetter)
After filling out all applicable run parameters, select the Run Resend Printouts/Emails Job button. A rerun job is launched. The status of that job can be seen in the job list below at the bottom of the page.

For more information about letters, see Configuring Alma Letters.

For more information on resending printouts and emails, see the Resending Printouts/Emails video (1:12 mins).
Finding Alternate Resource Suggestions for Citations

To run the citation alternate suggestions job, you must have one of the following permissions with an institution-wide scope:

- Fulfillment Services Operator/Manager
- Fulfillment Administrator
- General System Administrator

You can run a job to see suggested alternate editions for citations on the Citation Alternate Suggestions Job page (Fulfillment > Advanced Tools > Citation Alternate Suggestions). The job suggests electronic editions for physical citations, as well as FRBR related editions (if any are found). For more information, see Managing Citation Fulfillment Options.

Citation Alternate Suggestions Page

The results (suggestions) appear on the page, as well as in the job report (see Viewing Completed Jobs).

You can add optional criteria:

- A specific course
- Reading lists with a specific status
- Citations with a specific status

To see alternate editions for your citations:

1. On the Citation Alternate Suggestion page, select the dates for the courses for which you want to see suggestions. All courses that start on or after that date you set in Courses Starting on or After and ending before the date you select in Course Ending on or Before will be processed.

2. Optionally select additional matching criteria for the citations.

3. Select Run Citation Alternate Suggestions Job and select confirm in the confirmation dialog box. The job starts.

Information about the running job appears on this page, as well as on the Running/History tabs of the Monitor Jobs page (see Viewing Running Jobs). Select Refresh to update the page.

The job report includes the number of records processed, suggestions, and failed citations.