Introductions

• Moshe Shechter
  Alma Product Manager

With Ex Libris for 14 years. After a couple of years on the Aleph development team, I joined the Alma team in 2010 as business analyst and later as product manager.

My focus is in Fulfillment, Resource Sharing, User Management and Integrations.
Objectives and Target Audience

• By the end of this session you will understand the basic elements of physical and electronic fulfillment in Alma

• Session Target Audience:
  • Fulfillment administrators, new to Alma

Agenda

1. Fulfillment Units & Policies
2. Circulation Desks
3. Display Logic Rules
4. Labels
5. Direct Linking
6. General Electronic Services
7. Services Order
8. Next Steps, Support Resources and Survey
Fulfillment Units & Policies

TOU & Policies

TOU

Policies
# TOU & Policies - Loans

<table>
<thead>
<tr>
<th>Terms of Use Details</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td></td>
</tr>
</tbody>
</table>

- **Is Loanable**: Is Loanable
- **Is Recallable**: Is Recallable
- **Due Date**: 1 month
- **Requested Item Due Date**: 1 week Requested Item Due Date
- **Recall Period**: 10-day Recall Period
- **Recall Fee**: No Recall Fee
- **Lost Item Fee**: 10% Lost Item Fee
- **Lost Item Replacement Fee**: 25% Lost Item Replacement Fee
- **Lost Item Replacement Fee Refund Policy**: 100% Lost Item Refund
- **Maximum Fine**: No Maximum Fine (Default Maximum Fine)
- **Overdue Fine**: (5.48) Open Days Overdue Fine
- **Recalled Overdue Fine**: No Recall Overdue Fine (Default Value for recalled overdue fines)
- **Grace Period**: 10-day Grace Period (10-day grace period)
- **Is Renewable**: Is Renewable
- **Maximum Renewal Period**: No Maximum Renewal Period (Default Maximum Renewal Period)
- **Closed Library Due Date Management**: No Change To Due Date (Default Value for Closed Library Management)
- **Canceled Recall Due Date**: Restore to original due date (This option will take the due date of the loan from the library)
- **Overdue Notification Fee Type 1**: 2 days Overdue (Default Value)
- **Overdue Notification Fee Type 2**: 5 days Overdue (Default Value)
- **Overdue Notification Fee Type 3**: No Overdue Fee (Default Value - No Overdue Fee)
- **Overdue Notification Fee Type 4**: No Overdue Fee (Default Value - No Overdue Fee)
- **Overdue Notification Fee Type 5**: No Overdue Fee (Default Value - No Overdue Fee)
- **Maximum Period For Overdue Block**: No Maximum Block Period (No Maximum Block Period for Block when Overdue)

# TOU & Policies - Requests

<table>
<thead>
<tr>
<th>Terms of Use Details</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td></td>
</tr>
</tbody>
</table>

- **Is Requestable**: Is Requestable
- **Pickup Locations**: Pickup In Institution
- **Hold Shelf Period**: 7-day Hold Shelf (Default Value for HoldShelfPeriod)
- **Is Digitizable**:  
- **Is Requestable for Resource Sharing**: Not Requestable For Resource Sharing (Item is not requestable for Resource Sharing)
- **Request Priority**: Medium (Medium)
- **On Shelf Request Policy**: Use fulfillment unit definition (use fulfillment unit definition)
- **Personal delivery**: Personal Delivery - test (Do not deliver items at all)
- **Personal delivery fee**: Personal Delivery Fee - No Fee (Personal delivery is not charged with a fee)
- **Automatically convert to resource sharing**: Do not convert to resource sharing (Do not convert to resource sharing)
- **Digitization Fee per Digitization**: No Fee (Digitization request is not charged with a fee)
- **Digitization Fee per Page**: No Fee (Digitization request is not charged with a fee per page)
# Loans’ Relevant TOUs

## Loans’ Relevant TOUs

### Fulfillment Configuration Utility

- **Patron Identifier**: Johnson, Stirling
- **Item Barcode**: 9141
- **Due Date**: 27/08/2014 23:59:00 EDT

<table>
<thead>
<tr>
<th>Policy Type</th>
<th>Policy Name</th>
<th>Policy Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lost Item Replacement Fee</td>
<td>$100 per item</td>
<td>Default loss item replacement fee</td>
</tr>
<tr>
<td>Deducted Fee</td>
<td>$25.00 per item</td>
<td>Default deducted fee</td>
</tr>
<tr>
<td>Overdue Fee</td>
<td>$1 per overdue day</td>
<td>Default overdue fee</td>
</tr>
<tr>
<td>Recalled Overdue Fee</td>
<td>$1 per overdue day</td>
<td>Default recalled overdue fee</td>
</tr>
<tr>
<td>Grace Period</td>
<td>1 day grace period</td>
<td>Default grace period</td>
</tr>
<tr>
<td>Maximum Renewal Period</td>
<td>6 months maximum renewal period</td>
<td>Default maximum renewal period</td>
</tr>
<tr>
<td>Closed Library Date</td>
<td>Move to the end of the next open day</td>
<td>Move to the end of the next open day</td>
</tr>
<tr>
<td>Cancelled Due Date</td>
<td>Keep due date</td>
<td>No change to the due date</td>
</tr>
<tr>
<td>Last Loan</td>
<td>30 days</td>
<td>Default last loan</td>
</tr>
<tr>
<td>Recalled Date</td>
<td>Recall allowed</td>
<td>Recall is possible</td>
</tr>
<tr>
<td>Due Date</td>
<td>5 days</td>
<td>Default due date</td>
</tr>
<tr>
<td>Required Item Date</td>
<td>1 week required item date</td>
<td>Default required item date</td>
</tr>
<tr>
<td>Recal Date</td>
<td>3 days</td>
<td>Default recal date</td>
</tr>
<tr>
<td>Loan Fee</td>
<td>5 per loan</td>
<td>Default loan fee</td>
</tr>
<tr>
<td>Lost Item Fee</td>
<td>5 per lost item</td>
<td>Default lost item fee</td>
</tr>
<tr>
<td>Lost Item Replacement Fee</td>
<td>5 per lost item replacement fee</td>
<td>Default lost item replacement fee</td>
</tr>
</tbody>
</table>
TOUs -> Rules

Related Fulfillment Rules

Circulation Desks
Circulation Desks

Circulation Desk Operators
Display Logic Rules - Electronic

• If we do an all titles search for journal “School Library Journal” then we can see via the “Portfolios List” link that there are multiple portfolios.

Click here to see full list of Portfolios
• There are a total of 7 portfolios with Full text
• 5 portfolios include coverage of 2013 (green arrows)
• 2 portfolios do not include coverage of 2013 (red arrows) (not included in the “threshold” of the desired year)

• The 5 portfolios which do include Full Text coverage of 2013 are:
  1. EBSCOhost Education Research Complete
  2. EBSCOhost Library Literature & Information Science Full Text
  3. Academic OneFile
  4. General Business File ASAP
  5. General OneFile
**Display Logic Rules - Electronic**

- Now via Primo, as end user, we will search for an article which is in journal “School Library Journal” in an issue from 2013

  ![Search Result]

  Clicking the View It tab (here customized as “find it”) will show us the links to portfolios with this article available in full text.

**Display Logic Rules - Electronic**

- As previously shown there are 5 portfolios with “School Library Journal” Full Text for 2013. But here we see only 4 portfolio's

  ![Portfolios List]

  "General One File" is missing.

  We do not see “General One File” even though it has “School Library Journal” Full text available for 2013.
Display Logic Rules - Electronic

In order to see why ‘General One File’ does not appear we will access the “Discovery Interface Display Logic” section of the Fulfillment Configuration menu and then click the “Display Logic Rules” link.
**Display Logic Rules - Electronic**

- Here we see a rule which states “Hide service Full Text with Package = General OneFile if exists service Full Text with Package = Academic OneFile”
- This is why we do not see General OneFile

**Display Logic Rules - Electronic**

- We could also make a rule, for example, to state “If EBSCOhost Education Research Complete” exists for full text then do not show “EBSCOhost Library Literature & Information Science”
Display Logic Rules - Electronic

- First we will click “Add Rule”

- Then we make the conditions

Service to hide and condition

Use groups are relevant only for rules regarding physical inventory
Display Logic Rules - Electronic

• The condition has been added

Display Logic Rules - Electronic

Tipping a sacred cow: a new scheme may override the Dewey debate (The NEXT BIG Thing) (Dewey Decimal System)
Harris, Christopher

Before

Full text available at: EBSCOhost Education Research Complete
Available from 1974

Full text available at: EBSCOhost Library Literature & Information Science Full Text
Available from 1999

Full text available at: Academic OneFile
Available from 2000

Full text available at: General Business File ASAP
Available from 2000

After
Display Logic Rules - Electronic

• It is also possible to create a rule that hides service for the complete interface and not just the package

• Here we say: Hide Interface EBSCOhost if exists Interface Galegroup
Display Logic Rules - Electronic

**Tipping a sacred cow: a new scheme may override the Dewey debate.** *(The NEXT BIG Thing)*

Harri, Christopher

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**Before**

- Full text available at: EBSCOhost Education Research Complete
  - Available from 1974
- Full text available at: EBSCOhost Library Literature & Information Science Full Text
  - Available from 1996
- Full text available at: Academic OneFile
  - Available from 2000
- Full text available at: General Business File ASAP
  - Available from 2000

---

**After**

- Full text available at: Academic OneFile
  - Available from 2000
- Full text available at: General Business File ASAP
  - Available from 2000

Links for Interface EBSCOhost have disappeared

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Tracing Display Logic Rules Actions
Display Logic Rules - Tracing

Display Logic Rules may become pretty crowded. How can I trace if and how my rules are working?

```html
<title>Source: The Salina Journal | (0745-127X)</title>
<meta http-equiv="Content-Type" content="text/html; charset=utf-8" />
<head><link rel="stylesheet" type="text/css" href="/css/resolver.css" /></head>
<body>
<form name="resolverView1Form" method="post" action="/view/action/resolveView1.do">
</form>
</body>
</html>
```
Display Logic Rules - Tracing

This XML file does not appear to have any style information associated with it. The document tree is shown below.

```xml
  <context_object>
    <!-- Context object details -->
    <context_service context_service_id="1946977700000061" service_type="getFullText"/>
    <context_service context_service_id="1946977700000061" service_type="getFullText"/>
    <context_service context_service_id="1946977700000061" service_type="getFullText"/>
  </context_object>
</resolver_content>
```

Display logic rule: Hide service Full Text with Interface = EBSCOhost if exists service Full Text with Interface = Westlaw

```xml
<key id="Filter reason">
  Display logic rule: Hide service Full Text with Interface = EBSCOhost if exists service Full Text with Interface = Westlaw
</key>
```

Display logic rule: Hide service Full Text with Interface = EBSCOhost if exists service Full Text with Interface = Westlaw

```xml
<key id="Filter reason">
  Display logic rule: Hide service Full Text with Interface = EBSCOhost if exists service Full Text with Interface = Westlaw
</key>
```

Physical Services

Display Logic Rules - Physical

Example One

- Resource Sharing requests for a record with item owned by library and has an option for request
• To prevent this we can add a display logic rule ...

• Which would look like this:
Display Logic Rules - Physical

• So now we have stated: For all user groups hide the resource sharing request if the library owns a requestable copy

Display Logic Rules - Physical

• And now the resource sharing request links no longer exist

Previously resource sharing requests were here
Display Logic Rules - Physical

**Before**

**After**

Labels
**Labels**

- It is also possible to change the labels which appear in the GetIt and ViewIt tab.
- Below an item which may not be loaned appears as “Not loanable” and the library may want to change it to “For use in library.”

![Image of labels configuration](image1)

**Example One**

**Labels**

- The Labels configuration may be accessed from the Display Interface Display Logic section of the fulfillment configuration menu.

![Image of labels configuration](image2)

**Access the labels configuration**
Labels

• After clicking “labels” we can see the list of labels which display in Primo

Find label which you want to change and click “Customize”

This is the text we want to change

• Enter the new value and save

Now it will state “For use in library” instead of “Not Loanable”
Labels

• The change has taken effect
Labels

Example Two

- The text of the ViewIt tab may also be changed
- For example we will change here “Full text Available at” to “Link for full text”

Labels

- After clicking “labels” we can see the list of labels which display in Primo

This is the text we want to change

Find label which you want to change and click “Customize”
Labels

• Enter the new value and save

Now it will state “Link for full text” instead of “Full text available at”

Labels

• See the change
After

<table>
<thead>
<tr>
<th>Before</th>
<th>After</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full text available in ProQuest International Index to Performing Arts Full Text Available from 1996</td>
<td>Link for full text: ProQuest International Index to Performing Arts Full Text Available from 1996</td>
</tr>
<tr>
<td>Full text available in ProQuest International Index to Music Periodicals Full Text Available from 1995</td>
<td>Link for full text: ProQuest International Index to Music Periodicals Full Text Available from 1995</td>
</tr>
<tr>
<td>Full text available in EBCOhost Business Source Complete Available from 1994</td>
<td>Link for full text: EBCOhost Business Source Complete Available from 1994</td>
</tr>
<tr>
<td>Full text available in Academic OneFile Available from 1991</td>
<td>Link for full text: Academic OneFile Available from 1991</td>
</tr>
<tr>
<td>Full text available in General Business File ASAP Available from 2000</td>
<td>Link for full text: General Business File ASAP Available from 2000</td>
</tr>
<tr>
<td>Full text available in Business Academic ASAP Available from 1997</td>
<td>Link for full text: Business Academic ASAP Available from 1997</td>
</tr>
</tbody>
</table>

Direct Linking
The Direct Linking configuration may be accessed from the Display Interface Display Logic section of the fulfillment configuration menu.

Access the Direct Linking rules
Direct Linking

- Here is the article “Evolution of the Word: The New Testament in the Order the Books Were Written” which is in Booklist, July 1, 2012, Vol.108(21), p.4(1)

Direct Linking

- The ViewIt tab shows that there are three portfolios with the resource
- This user must click on one of them
- But ... the library may decide that instead of working this way the first link will open directly
Direct Linking

• In such a case we would define “enable direct linking” and also state “Enable direct linking when multiple services are available”

• On our case three services were available, and direct linking will be enabled

![Direct Linking Configuration](image)

Direct Linking

• Now as soon as the “ViewIt” tab is activated the resource opens in the ViewIt window

![ViewIt window](image)

Instead of getting list of portfolios here which contain the journal with the article – the link to one of them opens directly
• It is also possible to control the order in which the Online Electronic Services appear in the Primo ViewIt tab

We will see why and how the order of services here appears as it does
The Online Services Order configuration may be accessed from the Display Interface Display Logic section of the fulfillment configuration menu.

As we will see on the next slide, in the “Online Services Order” it is determined which packages and interfaces appear:
- At the top of the list
- At the bottom of the list
- In which order
In our example:
1. “EBSCOhost Business Source Complete” is at the top of the list
2. “Literature Resource Center” appears at the bottom of the list
Online Services Order

• “EBSCOhost Business Source Complete” is a package in Interface name EBSCOhost
• You can see this by searching for electronic collection name and then clicking "edit" and looking in general information tab field interface name

Online Services Order

• “Literature Resource Center” is a package in Interface name Galegroup
• You can see this by searching for electronic collection name and then clicking "edit" and looking in general information tab field interface name
Online Services Order

- In the “Online Electronic Services Order” Interface EBSCOhost appears before Interface Galegroup

![Image]

Online Services Order

- And therefore in Primo “EBSCOhost Business Source Complete” appears before “Literature Resource Center”

The first three here are all part of Interface Name EBSCOHost

The last three here are all part of Interface Name Galegroup
Online Services Order

- If we change the online electronic services order as follows (reverse EBSCOhost and Galegroup) ...

<table>
<thead>
<tr>
<th>Move Up</th>
<th>Move Down</th>
<th>Service Type</th>
<th>Service name</th>
<th>Service value</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Full Text</td>
<td>Interface</td>
<td>ProQuest New Platform</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Full Text</td>
<td>Interface</td>
<td>ProQuest</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Full Text</td>
<td>Interface</td>
<td>EBSCOhost</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Full Text</td>
<td>Interface</td>
<td>Galegroup</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Full Text</td>
<td>Package</td>
<td>Lexis-Nexis Academic</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Full Text</td>
<td>Package</td>
<td>Factsica</td>
</tr>
</tbody>
</table>

Before

<table>
<thead>
<tr>
<th>Move Up</th>
<th>Move Down</th>
<th>Service Type</th>
<th>Service name</th>
<th>Service value</th>
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<tr>
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<td>Interface</td>
<td>ProQuest New Platform</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Full Text</td>
<td>Interface</td>
<td>ProQuest</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Full Text</td>
<td>Interface</td>
<td>EBSCOhost</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Full Text</td>
<td>Interface</td>
<td>Galegroup</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Full Text</td>
<td>Package</td>
<td>Lexis-Nexis Academic</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Full Text</td>
<td>Package</td>
<td>Factsica</td>
</tr>
</tbody>
</table>

After

- Then we see this in Primo
- The three packages belonging to Interface name EBSCOhost are no longer at the beginning
Online Services Order

• If we had scrolled to the bottom of the GetIt tab we would have seen that Lexis-Nexis Academic was always at bottom.

Online Services Order

• This is because the package “Lexis-Nexis Academic” is defined to appear after interface name EBSCOhost and after interface name Galegroup.
Physical Inventory Order

• The sorting of the available physical inventory may be determined by the IP from which the access is being made

• Libraries and campuses may be linked to an IP range
Physical Inventory Order

- The system may be set to compare the IP from which access is made with the owning campus and library of the title’s inventory.
- Resources that belong to libraries in the IP range from which access is made will be preferred in the Primo display.

General Electronic Services
The General Electronic Service allows the library to define a service which uses a URL to search another site for information displayed on the page.

The URL automatically takes information from the record on the page and inserts it into the URL.

In this way the library can define general electronic services (such as Search in ProQuest Dissertations, Ask a Librarian, and so forth) that may be presented to patrons in Primo View It and Get It tabs.
**General Electronic Services**

- Here are some examples of General Electronic Services

<table>
<thead>
<tr>
<th>Service Name</th>
<th>Service Code</th>
<th>Public Name</th>
<th>Service Description</th>
<th>Display Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dissertation Abs</td>
<td>Dissertation Abs</td>
<td>search ProQuest Dissertations &amp; Theses database</td>
<td>Related service for print Dissertation Abstracts</td>
<td>ViewIt</td>
</tr>
<tr>
<td>ProQuest Dissertations</td>
<td>ProQuest</td>
<td>check ProQuest Dissertations &amp; Theses database</td>
<td>ProQuest dissertation service</td>
<td>ViewIt</td>
</tr>
<tr>
<td>Scanned Book Chapter</td>
<td>Request Book Chapter</td>
<td>Request scan of a chapter of a monograph</td>
<td>GetIt</td>
<td></td>
</tr>
<tr>
<td>Scanned Journal Article</td>
<td>Request Journal Article</td>
<td>Request scanned copy of an article from a journal</td>
<td>GetIt</td>
<td></td>
</tr>
</tbody>
</table>

We will now look at ProQuest Dissertations

**General Electronic Services**

- Service details tab of General Electronic Service

<table>
<thead>
<tr>
<th>Service Name</th>
<th>Service Code</th>
<th>Public Name</th>
<th>Service Description</th>
<th>Display Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>ProQuest Dissertations</td>
<td>ProQuest</td>
<td>check ProQuest Dissertations &amp; Theses database</td>
<td>ProQuest dissertation service</td>
<td>ViewIt</td>
</tr>
<tr>
<td>URL Template</td>
<td><a href="http://gateway.proquest.com/openurl?res_dat=xri%34pqt&amp;m&amp;title=%3fI%6f%2Fm%3b">http://gateway.proquest.com/openurl?res_dat=xri%34pqt&amp;m&amp;title=%3fI%6f%2Fm%3b</a></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Will appear in the ViewIt tab

Will go to this URL using this URL Template
General Electronic Services

- Service Availability Rules tab of General Electronic Service

![Service Availability Rules](image)

Will display if the genre is “dissertation”

---

General Electronic Services

- Now if we search the Primo Central Index (PCI) for title “Comparison of the Effect of Using Title Keyword Searching and Subject Headings among the 10 Divisions of Dewey Decimal Classification” we see the following in the ViewIt tab:

![ViewIt tab](image)

This is the General Electronic Service

Will display if the genre is “dissertation”
General Electronic Services

- Clicking the General Electronic Service link brings the record in ProQuest

Comparison of the Effect of Using Title Keyword Searching and Subject Headings among the 10 Divisions of Dewey Decimal Classification.
Tsai, Shu-En. 1998.

Abstract (summary) Translate
Bibliographic records taken from books listed in "OCLC Selected Titles for Research and University Libraries" are used to determine whether the use of terms in the title for subject searching is an effective alternative to the use of Library of Congress subject headings among the 10 divisions of Dewey Decimal Classification. Terms in each title are tested with term(s) in the first element of every Library of Congress subject heading. Three hypotheses are tested: (1) sciences and technology subject areas have the highest match rate; (2) match rate in the social sciences is much lower than that of sciences and technology subject areas; and (3) title keyword is an effective alternative to subject headings in sciences and technology subject areas. Among the 10 Dewey divisions, the 500 division, natural sciences and mathematics, has the highest subject heading exact match, a rate 50.2% in this study. The 800 division, disciplines in literature and rhetoric, accounts for the lowest percentage of subject exact match, 19.04%. (Author/IES)
Next Steps and Support Resources

- https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Fulfillment/080Configuring_Fulfillment

- https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Fulfillment/080Configuring_Fulfillment/050Physical_Fulfillment#Adding_Fulfillment_Policies

- https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Fulfillment/080Configuring_Fulfillment/100Discovery_Interface_Display_Logic

Q & A

Any Questions?
Session Survey Evaluation

Please use the following link https://www.surveymonkey.com/r/techsem2017 to provide feedback on your sessions.

THANK YOU