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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.

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 governs 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 (Tasks in the Task 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>
</tr>
</thead>
<tbody>
<tr>
<td>Acquisition</td>
<td>A work order request to perform some kind of technical service, for example copy cataloging.</td>
</tr>
<tr>
<td>Technical Services</td>
<td>A work order request to perform some kind of technical service, for example 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 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 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>
</tr>
</tbody>
</table>
| Digitization       | A work order request for digital copies of a physical or electronic resource. This is typically used to make a copy of a book chapter or an article for a patron or a group of students, and may require copyright clearance. The types of digitization requests are:  
  • Electronic - A digitization request for an electronic resource.  
  • Physical - A digitization request for a physical resource.  
  • Library Physical - A digitization request for a reading list citation associated with a physical item. The request is initiated by library staff. The librarian is asked to fill out copyright clearance information. |
<table>
<thead>
<tr>
<th>Request Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<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 <a href="#">Discovery Interface Display Logic</a>.</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.</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 <strong>Ready</strong>).</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 <a href="#">Purchase Requests</a>.</td>
</tr>
<tr>
<td>Recall</td>
<td>A workflow step requesting that an item be returned to the institution. For more information, see <a href="#">Recall Requests</a>.</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 Reshelfing</td>
<td>A restore request for an item that was returned after a lend request.</td>
</tr>
<tr>
<td>Request Type</td>
<td>Description</td>
</tr>
<tr>
<td>--------------</td>
<td>-------------</td>
</tr>
<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 the Booking in Alma video (22:20 mins). For a detailed Ask the Expert session on booking, see Booking.

**Pages for Managing Requests**

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 Switching Library Desks/Departments. Many of the pages below can also be reached by selecting a task in the Task List; see Tasks in the Task List.

<table>
<thead>
<tr>
<th>Page</th>
<th>Path</th>
<th>Request Types</th>
<th>Roles</th>
<th>Description</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  
• Extend the request to a later time or date  
• Mark the item as missing |

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<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>
<tbody>
<tr>
<td>Approval Requests</td>
<td>Fulfillment &gt; Resource Requests &gt; Approve Digitization Requests</td>
<td>Digitization</td>
<td>Fulfillment Services Operator</td>
<td>You must approve or reject digitization when digitization rules determine that approval is required or when a copyright approval task is specifically requested, such as for a citation.</td>
<td>Approving/ Rejecting a Request for Digitization</td>
</tr>
<tr>
<td>Create Request</td>
<td>Several ways. For example: search the repository and click Request beneath a physical item or title in the results.</td>
<td>Booking, Digitization, Hold, Move, Physical Item</td>
<td>Fulfillment Services Operator</td>
<td>You can create a request on an item, typically on behalf of a patron or a staff member.</td>
<td>Creating a Request from the Institution, Creating Booking Requests</td>
</tr>
<tr>
<td>Expired Hold Shelf Items</td>
<td>Fulfillment &gt; Resource Requests &gt; Expired Hold Shelf Items</td>
<td>Physical Item</td>
<td>Requests Operator</td>
<td>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.</td>
<td>Managing Expired Hold Shelf Items</td>
</tr>
<tr>
<td>In Process Items</td>
<td>Fulfillment &gt; Resource Requests &gt; Manage In Process Items or Acquisitions &gt; Post-Receiving Processing &gt; Receiving Department Items</td>
<td>Acquisition Technical Services, Binding, Digitization, Physical Item</td>
<td>Receiving Operator, Purchasing Operator, Work Order Operator (digitization)</td>
<td>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. 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:</td>
<td>Post-Receiving Processing</td>
</tr>
<tr>
<td>Page</td>
<td>Path</td>
<td>Request Types</td>
<td>Roles</td>
<td>Description</td>
<td>More Information</td>
</tr>
<tr>
<td>------</td>
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<td>-------</td>
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<td>------------------</td>
</tr>
</tbody>
</table>
| Pick Up Requested Resources | Fulfillment > Resource Requests > Pick From Shelf | Physical Item | Requests Operator | • 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 |  |
| Resource Request Monitoring | Fulfillment > Resource Requests > Monitor Requests & Item Processes | Binding  
Booking  
Digitization  
General Hold  
Move  
Physical Item  
Ship  
Restore | Fulfillment Services Operator  
Fulfillment Services Manager  
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  
Managing Requests and Work Orders |

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<table>
<thead>
<tr>
<th>Page</th>
<th>Path</th>
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<th>Description</th>
<th>More Information</th>
</tr>
</thead>
</table>
|      | Transit for Reshelving                   |               |                                | 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. 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. On this page, you can:  
  • Add a new borrow request  
  • View, edit, copy, cancel, or reject a request  
  • Ask the patron for more information  
  • Edit the physical item's information  
  • Recalculate the rota (see Resource Sharing Partners and RCTAs)  
  • Send the request to the partner institution  
  • Mark a request as recalled by the partner institution, received, returned by the patron, or completed (remove the request)  
  • Renew a request or request a renewal of a request | Resource Sharing Borrowing Requests |
|      | Resource Sharing Borrowing Requests      |               |                                | 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. 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. On this page, you can:  
  • Add a new lend request  
  • View, edit, copy, cancel, or reject a request  
  • Locate the item and print a slip for it  
  • Fulfill the request, physically or digitally  
  • Extend the due date for the request  
  • Communicate with the borrowing institution | Resource Sharing Lending Requests |
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; click the Place in Queue value in one of the items).

The top of the page 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
- 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.

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. A fulfillment policy exists that will change priorities for a group, however this is for future use only.

The priority is relevant for requests only before their workflow processing has started.
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.
- Cancel Physical Titles Requests - Cancels open requests for physical titles.
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
- Fulfillment Network Requests
Circulation Desk Operations Workflow

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

**Note**

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

---

**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).
- 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

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).
- 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).

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.

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.

Click 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 in the Add Request Attributes area (see step 4), the fields 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.
Click **Override ‘On Shelf Request Policy’** to override the configured fulfillment policy that determines where you can pick up resources. This enables you to request any pickup location.

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

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 request.

**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** in the **Add Request Attributes** area, the fields **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:

---

**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.
Staff Digitization Request

- **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.
- **Total Chapters Count** – Total number of chapters in the requested item.
- **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.

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 following radio buttons:

- **Description** – 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, click **Add Request Attribute**. The attribute appears in the **Additional Request Attributes** area. The available attributes depend on the selected **Request Type**:

<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 Creating Booking Requests.</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></td>
<td>Destination Locations</td>
<td>Where to deliver the copies</td>
</tr>
<tr>
<td></td>
<td>Due Back For Move Temporarily only</td>
<td>When the items are due back</td>
</tr>
<tr>
<td></td>
<td>Call Number Type</td>
<td>See call_number_type 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 /</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 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></td>
<td>Material Type Not available for Patron</td>
<td>Select the desired material type from the available types.</td>
</tr>
<tr>
<td>Request Type / Attribute</td>
<td>Attribute</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-----------</td>
<td>-------------</td>
</tr>
<tr>
<td>Electronic Digitization Request</td>
<td>Electronic Digitization Request</td>
<td>Select the date that the request is needed from the calendar tool.</td>
</tr>
<tr>
<td>Date Needed By</td>
<td>Select the date that the request is needed from the calendar tool.</td>
<td></td>
</tr>
<tr>
<td>Material Type</td>
<td>Select the desired material type from the available types.</td>
<td></td>
</tr>
<tr>
<td>Date Needed By</td>
<td>Select the date that the request is needed from the calendar tool.</td>
<td></td>
</tr>
<tr>
<td>Loan Period</td>
<td>The amount of time the user has before having to return the item.</td>
<td></td>
</tr>
<tr>
<td>General Hold Request</td>
<td>See Creating a General Hold Request.</td>
<td></td>
</tr>
</tbody>
</table>

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

5. Click 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.

For details on the resource request workflow, see Resource Requests Workflow.

For a digitization request, the request appears on the In Process Items page (see Digitizing Items). For more information, see Digitization Processing.

---

**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. Click Submit to submit the work order.

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

- Scan an item’s barcode on the Scan In Items page when scanning an item, and select 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 Switching Library Desks/Departments). 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 clicking Items for a physical titles search result. For details on the List of Items page, see Working with the List of Items.

---

**Note**

To create a work order for a set of physical items, define and run the Create Physical Item Work Orders job.

For details on scanning items, see Scanning Items.

For an in-depth overview of work orders, see Fulfillment - Conservation Laboratory Work Orders.

---

**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.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 hold request:

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

2. Click Request. The Create Request page appears.

3. In the Request/Process Type field, select General hold request (the only option available). 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. Click **Submit**. A confirmation message appears at the top of the page, indicating that the request was successfully submitted.

![Repository Search Page – Successful Request Submission Message](image1)

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 **Switching Library Desks/Departments**).

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

3. Select **Existing** and click **Choose**. The Quick Cataloging page appears, with the created barcode appearing in the **Barcode** field.

![Quick Cataloging Page](image2)

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. Click **Save**. The item 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. For an in-depth overview of work orders, see **Fulfillment - Conservation Laboratory Work Orders**
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](#)), click **Add a Terms of Use**.
2. Select **Request** and click **Next**.
3. From the drop-down box next to **Automatically convert to resource sharing**, select **Convert to resource sharing**, and click **Next**.

4. Confirm the settings for this policy and click **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. Click 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), click 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.
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.

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5. Optionally add a material type, item policy, and/or public note.

6. Click **Save**. The item appears on the Scan In Items page.

---

An Acquisition Technical Services work order is created. For an in-depth overview of work orders, see [Fulfillment - Conservation Laboratory Work Orders](#).

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 click **Attach**. The Scan In Items page displays the scanned item. The item’s destination (for Patron physical item requests) is the request destination (the item’s pickup location).

---

**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 Personal Delivery Notification email is sent to the patron.

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](#).

Note that 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 on requests, see [Creating a Request from the Institution](#).

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 Alma institutions that provide out-of-scope services to each other. A fulfillment network can be set up for a group of institutions regardless of whether they work with a Network Zone.

Fulfillment networks allow greater flexibility for:

- 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 specific 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 network.

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**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.

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Viewing Network Activities

Activity across all linked institutions can be viewed from the Patron Services page. A tab titled Network Activity, 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 user has the consortial services privilege. A filter allows the user to select transaction 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.
Pick Up Anywhere/Return Anywhere Configuration

To ensure that all the fields described below appear throughout the pickup anywhere and return anywhere processes, the following configuration steps must be completed:

- The **Pickup Location** policy must be set to **At Any Institution** in a request Terms of Use. See [Adding Fulfillment Policies](#).
- The **Institutions Relations** table must be configured. Please contact Ex Libris Support.
- The **Serves Other Institutions** check box must be selected in each library's summary. See [Managing General Institution Information](#).

For more information about return anywhere, see [Returning Items](#).

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 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.

Requesting an Item for Pickup Anywhere in the Network

In order to request a pickup from a different institution, the patron signs in to Primo, searches on a resource and selects from a list of institutions that have the resource available. The patron then selects from the list of allowed institutions when creating the request. The below workflow describes a workflow where a patron from one institution requests an item of another institution, to be picked up at yet a third institution. 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).

Primo Request - Pickup Location

The patron information and resource request is copied to the resource owning library. The pickup library appears in the owning institution's task lists, and pick slips.

Task List for Resource Owning Institution

Pick Slip for Resource Owning Institution
The item is scanned by the resource owning institution, the destination is shown and the item put into transit.

The item is received and scanned at the pickup institution with the resource owning institution selected.

The patron's user information is automatically retrieved by the pickup institution and the patron is informed that their request is available for pick up. Again at loan time, the resource owning institution is selected. The remainder of the loan life cycle is a standard process.

When the patron returns the resource to the pickup institution, the resource is scanned in as normal with the resource owning institution is selected. The Manage Item Returns interface will indicate that the next step for the item is to transit back to its home institution.
Manage Item Returns
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)

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.

![Patron Services Page – Loans Tab](image)

**Patron Services Page – Loans Tab**

The Patron Services page displays the following core patron information:
• Patron name
• ID
• User group
• Active balance (of the patron’s fines/fees)
• Notes
• Number of items on the On Hold Shelf
• Overdue items

Note
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 clicking 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:

• Click Renew All to renew all items that the patron currently has on loan. The system displays an informational message and sends the Borrowing Activity Report letter with the updated due dates, where relevant.
• Click Renew Selected to renew all items that are selected on the loan display. The system displays an informational message and sends the Borrowing Activity Report letter with the updated due dates, where relevant.
• Click 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.
• If the patron has a social account attached, click Detach from Social Account to disassociate the social login from the patron.
• Click 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.
• Click Send Activity Report to send a report of the patron’s activities to the patron.
• Click Send Return Receipt to send a return receipt to the specified patron for items returned to the circulation desk. For details on configuring the sending of receipts automatically, see the relevant field descriptions in Circulation Desk – General Information Fields in Configuring Circulation Desks. For details on customizing the letter that accompanies the return receipt, see Configuring Alma Letters.
• Click Send Loan Receipt to send a loan receipt to the specified patron for items borrowed at the circulation desk. For details on configuring the sending of receipts automatically, see the relevant field descriptions in Circulation Desk – General Information Fields in Configuring Circulation Desks. For details on customizing the letter that accompanies the loan receipt, see Configuring Alma Letters.
• Click Send Requests Report to send a report to the specified patron listing all requested items, broken down by Not Active, In Process, and On Hold Shelf.
• Click 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).

- Click the Loans tab to view the patron loaned items. For details, see Loaning Items.
- Click the Returns tab to view the patron returned items. For details, see Returning Items.
- Click 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.

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**Note**

- 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.

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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).

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**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).

---

**Patron Identification Page**

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.
If the user is acting as a proxy for another patron (see Managing Proxy Users), select Use proxy and click Go. The Proxy for field appears. Select the patron for whom this user is acting as a proxy and click 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.

New for December! 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.

## Registering Patrons

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

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

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), click Register New User. The Quick User Management page appears. Follow the instructions in Adding Users. When you are done, click Update User.

The Quick User Management page is slightly different when accessed by clicking 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>This field is pre-filled if user ID generation was configured for primary identifier. See Configuring User ID Generation. 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.

To register a walk-in patron who belongs to another institution in the Fulfillment Network:
1. On the Patron Identification page (Fulfillment > Checkout/Check-in > Manage Patron Services), use the patron’s local ID to identify the walk-in patron, just as local patrons are identified at the desk.

![Patron Identification](image)

**Search for Patron in Local Institution**

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

2. If the patron’s ID is not found at this institution, search for the ID at the patron’s home institution:
   1. Select **Find user in other institution** to open the Fulfillment Network search fields.

   ![Find user in other institution](image)

   **Search for Patron at Another Institution**

   2. Select the patron’s home institution from the **Institution** drop-down list.
   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 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.

   ![Scan patron’s ID or search for patron](image)

   **Note**

   - If an institution wants to search for a patron by fields other than patron ID, the `fulfillment_network_search_by_all` parameter should be set to `true`.
   - If an institution has defined hidden identifiers, these identifiers will not be used for searches in a fulfillment network unless `fulfillment_network_search_by_all` is set to `true`.

   For more information about the fulfillment_network_search_by_all parameter, see Configuring Other Settings.

4. Click **Find User**.

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

   ![Quick User Management](image)

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

   ![Online Import](image)

3. Scan or type the patron’s ID in the **User Identifier** field. This should be the ID that exists in the student management system.

4. Click **Find User**.

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

6. Click **Update User** to create the patron in the local institution’s Alma. The Patron Services page opens, allowing you to manage patron services.

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

**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, click the **Edit info** link. The Quick User Management page opens. Follow the instructions in [Adding Users](#), or click **Full Information** and follow the instructions in [Editing Users](#).

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

**Loaning Items**

Items are loaned as part of the circulation desk workflow (see [Circulation Desk Operations Workflow](#)), or the patron can bring the item directly from its permanent location to the circulation desk to be loaned.
When loaning an item that does not currently exist in the repository, you can create a new item to be entered into the repository by clicking **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**.

**To loan a requested item:**

1. On the Patron Services page (see Selecting a Patron), click the **Loans** tab. In the **Scan item barcode** field, scan in or manually type the barcode of the requested item. You may search for an item by typing its title or using the icon. The Repository Search page opens, displaying the search matches.

   **Note**

   If you manually enter a barcode that does not exist, a dialog box is displayed indicating that the item was not found. You can click **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 click **Select**. The item’s barcode is displayed in the **Scan item barcode** field.

3. Click **OK**. The item details are displayed in the Patron Services Loans tab.

   **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 closing hour of the library on the day the patron’s record expires. If the library is closed on that date, the Closed Library Due Date Management Policy is invoked (see the Closed Library Due Date Management Policy entry in Fulfillment Policy Types).

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

5. For the relevant loan, select from the following options in the row actions menu:
   - **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 To view loan notes).
   - **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 To view loan notes).

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

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.

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. Click OK to add the details of the loan to both the Loan Status column of the Patron Services page and to the Fines/Fees tab of the User Details page (see Editing Users).

6. Click Done. You are returned to the Patron Identification page. If the Creates loan receipts check box in the circulation desk is selected (see Adding a Circulation Desk) and a loan was performed, a loan receipt will also be sent.

Columns displayed on the loans grid may be selected by clicking 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: Normal, Recalled, Renewed, Lost, Claim Returned)
- Item Policy
The columns that are hidden by default are:

- Call Number
- Last Renew Date
- Last Renew Status
- Accession Number
- Alternative Call Number
- Author
- Publication Year

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), click the Loans tab.
2. Click Create Item. The Choose Holding Type dialog box appears.
3. Choose the holding type and, where relevant, the citation type, and click Choose. The Quick Cataloging page appears.

4. Configure resource and item information and click 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 Fulfillment - Conservation Laboratory Work Orders.

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

1. On the Patron Services page (see Selecting a Patron), click the Loans tab.
2. Select the loan whose due date you want to change and click Change Due Date. The Select Due Date dialog box opens.
3. Click the **New due date** box and select the due date from the **Calendar** dialog box.

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

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

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

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

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**), click the **Loans** tab.

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

3. For the lost item, select **Lost** from the row actions menu. The Lost Item dialog box opens with the fine/fee information.

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

**To claim an item was returned:**

1. On the Patron Services page (see **Selecting a Patron**), click the **Loans** tab.

2. In the **Loan display** drop-down list, select **All** and then select the item that is claimed to have been returned.

3. Select **Claimed return** from the row actions menu. 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**), click the **Loans** tab, and select an item.

2. In the **Loan display** drop-down list, select **All** and then select the item that is claimed to have been returned.

3. Select **View notes** from the row actions menu. The Loan Notes page opens.
   
   For more information on adding, editing, and deleting notes, see **Notes Tab**.

   **Note**

   Loan notes are still visible after the loan is returned.

---

**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**), click 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 Page](image)

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

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

### 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.

1. **Mark an item as lost**
   - 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 for the relevant item.
2. **Configure an item to be marked as lost when 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) by clicking **Add Overdue and Lost Loan Profile**. For details, see Configuring Overdue and Lost Loan Profiles.
3. **Search for Lost Items**
4. **Configure Lost Loan Parameters**
5. **Create Lost Loan Fulfillment Sets**
6. **Close Lost Loans**

### Lost Item Management

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

1. **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 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) by clicking **Add Overdue and Lost Loan Profile**. For details, see Configuring Overdue and Lost Loan Profiles.
2. **Search for items marked as lost** by performing an advanced search in the repository. Click the Advanced Search link and in the Physical Items column, select **Process Type**. On the Advanced Search page, select **Equals** and **Loan** in the drop-down lists and click **Go**. For details on advanced searches, see Performing an Advanced Search for a Repository Item.

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You can also configure the following:

- Lost items can be excluded from appearing in repository searches (configurable in the Resource Management Configuration menu – 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 for a Fulfillment Unit and click 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. 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 loan is returned after the loan has been closed, the Lost Item Replacement Fee Refund Ratio policy is not invoked; rather, any credit for the returned loan must be applied manually to the patron's record.

   **Note**

   If an item is determined to be lost and the policy for a lost loan is Not Requestable, the Requests - Recalculate After Inventory Update job detaches the request from the item and potentially cancels the request (if no other items can be used for fulfilling the request). If the item is found, this job re-links the request to the item. For details, see Requests – Recalculate after Inventory Update in Viewing Scheduled Jobs.

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**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.

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, a transit slip 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), click 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 click
   ![Barcode Scanner]
   and select the item being returned, and click OK. The item details are displayed.
4. For the relevant loan, select from the following options in **Actions** menu:
   - **Work order** – Creates a request; you can select a work order or other request (see step 2 in [To create a request](#)).
   - **Loan history** – View the audit trail of an item’s loan history (see [To view loan notes](#)).
   - **View notes** – View notes regarding a loan (see [To view loan notes](#)).
   - **View queue** – View the queue of requests for an item.

5. Click **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 clicking 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
- Alternative Call Number
- Author
- Publication Year

**To return multiple items:**

1. Open the Manage Item Returns page (**Fulfillment > Checkout/Checkin > Return Items**).

   ![Manage Item Returns Page](image)

   **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.

2. Scan or enter the item barcode in the **Scan item barcode** field, or click **Scan item barcode**.
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. Click **OK**. The item details are displayed on the Manage Item Returns page.

   ![Manage Item Returns Page](image)

   **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, click **Change Return Date**. The Select Return Date dialog box opens.
   2. Click in the **Return date** box and select the return date from the Calendar dialog box.
   3. Optionally, select the return due time in the **At** field. When the time is not specified, the system uses 23:59 (and not the library's closing time) as the time of the new return date.
   4. Click **Submit**. The return date is changed on the Manage Item Returns page.

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

6. If required, select one of the following options from the row actions menu:
   - **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 To view loan notes)
   - **View notes** – Displays notes on the loan (see To view loan notes)

7. Click **Exit** to exit the page, or click **Go to Patron Services** to open the **Patron Identification** page.
Viewing Fines and Fees and Receiving Payments

Patrons may incur fines and fees for many reasons. 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 a message (Fine Fee Payment Receipt Letter) to the patron. To configure the message, see Configuring Alma Letters.

Viewing a Patron’s Fines and Fees

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

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

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

To view a patron’s fines and fees:
1. On the Patron Identification page (Fulfillment > Checkout/Checkin > Manage Patron Services), enter the patron’s name in the Scan patron’s ID or search for patron field and click Go.

The Patron Services page appears.

2. Click the value in the Active balance link.

The Fines/Fees tab on the User Details page appears. For details on adding fines and fees, see Assigning Fines/ Fees to Users.

3. Click 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 fine/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 click Go. The Patron Services page appears.

2. Click 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 (on the Library/Desk Selector, see Switching Library Desks/Departments).

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

![User Fines and Fees Page](image)

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

![Patron Details Dialog Box – With Balance](image)

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. Click Send and then click 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.


**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 click Go.

   The Patron Services page appears.

   Pay Link on Patron Services Page

2. Click 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. Click Send.

---

**Note**

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

Note

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

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 clicking 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
Fulfillment Network Requests

Requests between institutions in a fulfillment network are now 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.

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.
   1. Set the Profile Type to Fulfillment Network.
   2. 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.
   1. In the locate profile parameters, enter the partner’s Alma URL and institution code.
   2. If selecting the Check item requestability check box on the profile parameters, the Is Requestable policy will be consulted instead of the Is Requestable for Resource Sharing policy that is used in other resource sharing situations. For more information, see Adding Fulfillment Policies.

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

- **Preferred Pickup Institution**: can be any institution in the fulfillment network.
- **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**: 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.

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](image)

![Hold Request at Pickup Institution](image)

The item is picked off the shelf and put on the hold shelf at the Science Library.

![Put Item on Hold Shelf](image)

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.

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.

Patron Not Registered at Loaning Institution

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

Pickup at Originating Institution

A new resource sharing request is created at West University. East University is included in the rota.

Borrowing Request

Borrowing Request Rota

The linked account has been created for patron Demo2 at East University, and a hold request is created.

Patron Registered at Lending Institution

Hold Request at Lending Institution
When the item is picked off the shelf and scanned in, it is put in transit to the pickup location at West University.

Scan In at Lending Institution - Item in Transit

When the request is received at West University, it is put on the hold shelf.

Scan in at Originating Institution

Item on Hold Shelf at Originating Institution

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

Borrowing Request History

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

The item's destination is: East University, Main Library

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 Easy University.

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

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

1. Invoke the relevant Booking configuration settings, as follows:
   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.

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

- **Pickup locations** – Indicates from where the item can be picked up.
- **Future limit** – Indicates how far in advance an item can be reserved through a booking request.
- **Back to back booking** – Indicates the minimum amount of time required between consecutive bookings (booking requests for the same resource & requester).

For details on configuring booking policies, see [Configuring 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 To add fulfillment unit rules). 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. Click 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.

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. Click 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. For the complete list of all requests for all departments, see the Resource Request Monitoring page.

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.

![Workflow Diagram]
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 clicking **Print Slip** beneath the relevant item.

---

**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 and Item Process Management](#) for a detailed Ask the Expert session on work orders and item process management.

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

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

The available facets are as follows:

### Resource Request Monitoring Page Facets

<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>
</tbody>
</table>

**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.
<table>
<thead>
<tr>
<th>Facet</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<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>Date on which the request was placed. Options are: Today, Yesterday, Up to Three Days Ago, Up To a Week Ago, Up To a Month Ago and Older.</td>
</tr>
<tr>
<td>Date Needed By</td>
<td>Date on which the item is needed. Options are: Undefined and Earlier Than Today.</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>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 the 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. Click 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. Click **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. This uses the `FullResourceRequestSlipLetter` letter. See [Pickup at Shelf](#).
- **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 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 `CONVERT_HOLD_TO_BORROWING` privilege (see [Privileges Report](#)). 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.

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).

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

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).

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. 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 click **Execute**. The print slip option uses the letter, **FulReasourceRequestSlipLetter**. 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 clicking this option.

- **Print Slip Report** – Creates either an XML or Excel report that contains a detailed list of resources that need to be picked up. It can be used instead of printing separate call slips for each request. The report can be sent to a printer, emailed to a user, or displayed on the screen. This link opens the following dialog box, which allows you to specify the format type of the report and the report’s destination:
Choose one of the following destination types in the **Type** field and click **Send**:

- **Printer** – The Excel report is sent to the printer destination selected from the **Printer** drop-down list.
- **User** – The report is attached to the Print Slip Report Letter that is sent to the email address of the user specified in the **User** field. To customize the Print Slip Report letter, configure the **FulPickupRequestReportLetter** letter. For more information, see Configuring Alma Letters.

  - If you prefer to view the report on the screen, click **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 notification (**Ful Cancel Request Letter**) of the cancellation to patrons. Click **Confirm**. To configure the notification, see Configuring Alma Letters.

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

    If an expiration date passes and an item is not picked up from the shelf, it is marked as missing. The **Requests - Handle 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 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.
  - **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 **CONVERT_HOLD_TO_BORROWING** privilege (see Privileges Report).
    - 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, click **Select all** and choose either **Cancel** or **Print slip** from the **Execute** drop-down list, and then click **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.
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 Fulfillment - Understanding in-house use and Alma Analytics reports for in-house use.

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.

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

To scan an item:
1. On the Scan In Items page (Acquisitions > Post Receiving Processing > Scan In Items or Fulfillment > Resource Requests > Scan In Items), enter the barcode with a wand or manually by either entering it in the Scan item barcode field or clicking the Browse icon to search for a barcode. The fields on this page are described in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| Place directly on hold shelf | Select from the following:  
  - 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).  
  - 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).  

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 Resource Request Monitoring page (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. |
| Automatically print slip | The method for printing the slip:  
  - No – Manual selection is required (default).  
  - Yes – If multiple requests match the scanned item, one is activated automatically.  

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. |
| Register in-house use | 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 clicking More Info on the Repository Search page.)  
If there is a pending request for an item, no in-house use is registered when this check box is selected.  
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.  
This field appears only when the Set status to field does not appear on the page. |
| Work order type | 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). |
| External identifier | Whether an identifier, such as a name or an email address, exists for the item in an external system (Select No or Yes). Displayed only when working at a Resource Sharing library. |
| Set status to | The material status (from a list predefined by an administrator). Note the following:  
  - 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.  
  - If this field does not appear, statuses are set automatically. |
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| 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 (Required) | The barcode of the item. You can enter part of the barcode and press the down arrow on your keyboard to select from a list of options that match your entry. When you click the **Browse icon**, the Repository Search page opens. Perform a search in the repository, select the item you want, and click **Select**.  
|                              | **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 clicking this, the Choose Holding Type pop-up window opens. Select the holding type and, where relevant, the citation type, and click **Choose**. The Quick Cataloging page opens, where you configure resource and item information and click **Save**.  
|                              | After completing this process, an Acquisition Technical Services work order is created for the item (the default work order type). For an in-depth overview of work orders, see [Fulfillment - Conservation Laboratory Work Orders](#).                                                                                                                                 |
| Scan request ID              | If there are multiple requests that may be fulfilled by the item, and the **Automatically print slip** option was not selected, enter the request identification number that was created when a request was submitted, and click **OK**. 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.

![Scanned In Items Page](image-url)
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>
<tr>
<td>Destination</td>
<td>The library or location to which the item is to be sent. Possible values are: &lt;Library Name&gt;, Reshelve To &lt;location name&gt;, Manage Locally – Indicates that the item has been scanned in at a Work Order department, and has to be processed there, Digitize – For resource sharing and digitization requests, Document Delivery – For resource sharing and digitization requests, Deposit – For resource sharing and digitization requests, &lt;Partner Name and Request Number&gt; – For resource sharing requests</td>
</tr>
<tr>
<td>Barcode</td>
<td>The barcode of the identified resource.</td>
</tr>
<tr>
<td>Request Type</td>
<td>The reason that the item is being sent.</td>
</tr>
<tr>
<td>Requester</td>
<td>The name of the requester.</td>
</tr>
<tr>
<td>Requester ID</td>
<td>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.</td>
</tr>
<tr>
<td>Place in Queue</td>
<td>A number which is a link to the queue of requests for the scanned-in item.</td>
</tr>
<tr>
<td>Checked In</td>
<td>A blue slider indicates that the scanned item has a loan attached to it.</td>
</tr>
</tbody>
</table>

**Note**

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

The item continues its processing according to the Request Type:

- **Acquisition technical services** – The item is to be processed after the receiving process (Copy cataloging, Physical processing, Temporary storage) is complete.
- **Move permanently** or **Move temporarily** – The item is sent to a different location in the institution (see Moving Items).
- **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.

2. 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 click Confirm.

3. Click Exit to return to the Alma home page, or click Go To Manage Department Items to open the Items in Department page (see Managing Receiving Department Tasks).
   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), click 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>
</table>
| Place directly on hold shelf | Select from the following:  
  ◦ Yes – The item is to be placed directly on the hold shelf. An On Hold Shelf letter is sent to the patron, indicating that the item is ready for pickup at the hold shelf (see Configuring Alma Letters).  
  ◦ No – The item not yet ready for the hold shelf and is to be designated for Hold Shelf Processing. After Hold Shelf Processing is complete, scan the item into the relevant circulation desk. The item is placed on the circulation desk’s hold shelf, and an On Hold Shelf letter is sent to the patron, indicating that the item is ready for pickup at the hold shelf (see Configuring Alma Letters).  

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 nevertheless appear as On Hold Shelf on the Resource Request Monitoring page (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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| Change type     | Select a different type of request (from a list predefined by an administrator). You can select from:  
  ◦ Temporary  
  ◦ Permanent  
  ◦ Restore                                                                                                                                         |
| Location        | Select another library location (from a list predefined by an administrator) in which you want to place the item.                                  |
| 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:                                                                 |

Ex Libris, a ProQuest Company
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reading list</td>
<td>Click <strong>Browse</strong></td>
</tr>
<tr>
<td></td>
<td>to open the Reading Lists Task List page and select another predefined reading list with which to associate the item (see Managing Reading Lists).</td>
</tr>
<tr>
<td>New Barcode</td>
<td>Enter a new barcode for the item.</td>
</tr>
<tr>
<td>Scan item barcode (Required)</td>
<td>Enter a different item barcode. When you enter part of the barcode and click <strong>Browse</strong>, the system suggests items that satisfy your entry. Select the item you want, and click <strong>OK</strong>.</td>
</tr>
<tr>
<td>Check requests</td>
<td>Select to indicate that changes made to the <strong>Location</strong> and <strong>Item policy</strong> 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.</td>
</tr>
<tr>
<td>Update RFID</td>
<td>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. 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>
</tr>
<tr>
<td>Due back</td>
<td>Click in the field to open the Calendar dialog box and specify a different date for the item to be returned. When a due back date arrives, an automatic job picks up items shelved at temporary locations and places a restore request on them. This triggers a process that moves the items back to their permanent location. (Note that at this stage, the descriptive record may be suppressed from publishing or deleted.) For details on this job, see Viewing Restore Request Jobs.</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 <strong>None</strong> 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, click **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.
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.

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.

Note

The Active Hold Shelf option appears only when you are at a circulation desk; see Switching Library Desks/Departments.

The Active Hold Shelf Items page (Fulfillment > Resource Requests > Active Hold Shelf Items) 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. Click 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, click Back to return to the Active Hold Shelf Items page.

If the circulation desk is defined as a reading room, three tabs appear on the Active Hold Shelf Items page:

- **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** – Prints a call slip for the item that can subsequently be attached to the item by the Requests Operator. You can generate print slips for multiple items simultaneously by selecting the check boxes of the relevant items and clicking the Print Slips button.
- **On Shelf (Not Final)** – Items that have been loaned to a patron but are still on the shelf in the reading room. Select from the following options:
  - **Loan to patron** – Transfers the item to the patron. The item is transferred to the Held by Patron tab.
  - **Print slip** – Prints a call slip for the item that can subsequently be attached to the item by the Requests Operator.

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 – General Information Fields table in Adding a Circulation Desk).

To cancel a request:

1. Click Cancel request for the relevant item. The Confirm Request Cancellation page opens.
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 (Ful Cancel Request Letter) 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. To configure the email, see Configuring Alma Letters.

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

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.

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 Switching Library Desks/Departments.

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:

![Expired Hold Shelf Tabs](image)

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

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

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

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

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

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

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

  - A cancellation message is sent to the current requester, and the request is deleted.
  - The item is placed on the active hold shelf for the next patron who has requested this item.
A call slip is printed for the item with the new requester’s details.

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

![Expired Hold Shelf Items Page - Send to Institution Tab](image)

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

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

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

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 Profile 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).

Note

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

For more information, see Digitization Requests Flow.

Approving/Rejecting a Request for Digitization

To approve digitization, you must have the following role:

- Fulfillment Services Manager

You must approve or reject digitization when digitization rules determine that approval is required (see Configuring Digitization Profile 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 Persistent UI-Elements) or after clicking 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 filter and the Find filter, 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 clicking 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 click Save. This action is possible only if the request already has an expiration date.
• Approve or reject the request - See below.

• View relevant digitization profile - To view the digitization profile 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.

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.

2. If you clicked 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>
<tr>
<td></td>
<td>CC order date</td>
<td>The date the copyright clearance was ordered</td>
</tr>
</tbody>
</table>
3. Approve or reject the digitization request:

- Click **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 click **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
  - SIPX (relevant for Leganto with SIPX; see Working with SIPX)

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

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**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.

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**Digitizing Items**

To start the digitization process, ensure that you are at the digitization department that currently holds the item; see **Switching Library Desks/Departments**.
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 Persistent UI-Elements):

- 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 Profile Rules).

Note

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 Switching Library Desks/Departments.

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 clicking 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 Profile 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.

In Process Items: Request Management Page

- 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, click **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 click **Save**.

To delete a note, select **Delete** from the row actions list for the note that you want to delete and click **Confirm** in the Confirmation Message pop-up window.

To locate a note in the list of notes, enter the text for which you want to search in the **Find** box and select the field — **Created by**, **Updated by**, or **Note** — in which you want to search for this text.

- **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. Click **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, click **Browse** in the **File name** field and select a file. Add a URL and/or note, if required, and click **Add Attachment**. The attachment 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 click **Save Attachment**.

- To delete an attachment, select **Delete** from the row actions list for the attachment that you want to delete and click **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 click **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. The following is an example of the notification letter.

![Notification Item Letter](image1)

**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. The following is an example of the notification letter.

![Notification Item Letter](image2)

**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 clicking in the relevant click 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 profile 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.
A message appears if the limit of the total digital file size has been reached. A single file has maximum size of 10 MB. 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 Item is Requested by Another Patron 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 recall letter, FullItemChangeDueDateLetter, is sent to the patron. The recall 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.
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

- **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. 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 or Broker-based requests. Each type of sharing has slightly different rules and follows different workflows.

Peer-to-Peer Resource Sharing

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.

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

Broker-based Resource Sharing

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.
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. Clicking 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**

---

**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.
The patron return may also be done through the patron services workbench or the Return Items interface.

---

**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...ion_profile/v2
- SLNP: https://developers.exlibrisgroup.com.../SLNP/Messages

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

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).
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
   - A network zone search, if applicable
   - A blank form

   **Borrowing Request Local Search**
   [Image of borrowing request form]

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

   **Borrowing Request Search Network Zone**
   [Image of borrowing request form]

   **A blank form**
   [Image of borrowing request form]
Manual Borrowing Request

See [Manually Adding A Request](#)

- From an external source

![External Resource Search](image)

**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

![Primo Get It Pane](image)

**Borrowing Request in the Primo 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 click the Rota tab. Click 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, 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. The patron return may also be done through the patron services workbench or the Return Items interface.

### 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 returned item is then shipped back to the lending institution. The temporary BIB record, temporary holding, and temporary item are removed from
the system. 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). For detailed Ask the Expert sessions on resource sharing, see Resource Sharing Setup and Workflows – Part 1 and Resource Sharing Setup and Workflows – Part 2.

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 send a recall messages to the borrower institution when the shipped item is 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.

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 the same as a digitization request, based on the digitization profile (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 Profile Rules).

If the digitization profile is 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.
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 additional inactive filters have been enabled in Borrowing Requests Inactive Filters, those filter options display as well.

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

- **Status** – Status of the borrowing request.
  
  There are statuses that indicate the final step in the request is done (terminal statuses). Requests in these statuses may be removed. The list of terminal statuses follows:

  - Cancelled by partner
  - Cancelled by patron
  - Cancelled 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:

  - Created borrowing request
  - Declared lost by partner
  - Expired
  - Exported to third party
  - Externally obtained
  - Lender check in
  - Loaned item to patron
  - Locate failed
  - Locate in process
  - 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
• Report lost item to partner
• 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
  • Up to a week ago – Requests created up to a week before the current date
  • Up to a month ago – Requests created up to a month before the current date
  • 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).
To manage resource sharing borrowing requests:

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

You can click 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 cancelled by partner
- Borrowing requests recalled
- Borrowing requests returned by patron
- Borrowing requests with active general messages
- Borrowing requests with active notes

2. To add a request, click 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).

3. To manage a request, click the action for a request, as described in the following table:

<table>
<thead>
<tr>
<th>Link</th>
<th>Description</th>
</tr>
</thead>
</table>
| View   | Modify the request in the Resource Information dialog box (see Editing a Borrowing Request). View request information. Appears only when the request’s status is one of the following:  
   - Returned item to partner  
   - Request completed  
   The Request completed status indicates that the request has either been delivered, or was canceled before it reached the hold shelf.  
   - Shipped digitally  
   - Canceled by partner  
   - Cancel requested |
| Remove | Remove the request. Appears only when the request’s status is one of the following:  
   - Returned item to partner  
   - Request completed  
   The Request completed status indicates that the request has either been delivered, or was canceled before it reached the hold shelf.  
   - Shipped digitally |
<table>
<thead>
<tr>
<th>Link</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cancel</td>
<td>Cancel the request. Appears only when:</td>
</tr>
<tr>
<td></td>
<td>◦ The request is still active</td>
</tr>
<tr>
<td></td>
<td>◦ The request does not have a status of Loan</td>
</tr>
<tr>
<td></td>
<td>◦ The request has not been shipped</td>
</tr>
<tr>
<td></td>
<td>◦ No partner exists or the configured active partner supports the Cancel feature</td>
</tr>
<tr>
<td></td>
<td>When canceling a request, the request’s status becomes Canceled by staff.</td>
</tr>
<tr>
<td></td>
<td>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:</td>
</tr>
<tr>
<td></td>
<td>◦ The hold request is canceled</td>
</tr>
<tr>
<td></td>
<td>◦ The item moves to the expired hold shelf</td>
</tr>
<tr>
<td></td>
<td>◦ The request is marked as Completed</td>
</tr>
<tr>
<td></td>
<td>For details on the Primo My Account tab, see My Account.</td>
</tr>
<tr>
<td></td>
<td>When a request is canceled, a message (Ful Cancel Email Letter) is sent to the patron. To configure the message, see Configuring Alma Letters.</td>
</tr>
<tr>
<td>View Network Resources</td>
<td>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.</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.</td>
</tr>
<tr>
<td></td>
<td>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>Send</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>Link</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Send Query to Patron</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 letter. 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 step 3 in Resource Sharing Workflow.</td>
</tr>
<tr>
<td>Renew</td>
<td>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 (Ful Borrowing Info Letter) and a renewal fee may be charged. 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).</td>
</tr>
<tr>
<td>Request Renew</td>
<td>Renew a resource sharing borrowing request. 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 (Ful Borrowing Info Letter) and a renewal fee may be charged. 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. Note If Renewal Response was not selected for the workflow profile, the request is automatically renewed after clicking the Request renew link; the request's status is Renewed by partner, and the Renew link does not appear. This option appears for requests with a Received status.</td>
</tr>
<tr>
<td>Receive</td>
<td>Open the Received Items page where you select a receiving format and enter a temporary barcode to enable receiving the resource (see Resource Sharing Partners). If the generate_resource_sharing_temp_barcode configuration setting is set to true, the temporary barcode is displayed automatically (see Configuring Other Settings). See Receiving Items.</td>
</tr>
<tr>
<td>Recall</td>
<td>Recall shipped items when a local hold request is placed for that resource. The recall function is applicable to both ISO and email partners. You can configure which loans are recalled first if the requested resource has both copies that were shipped to a remote borrower and copies loaned to local patrons. The parameter that controls this choice, rs_prefer_recall_method.</td>
</tr>
<tr>
<td>Link</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>defaults to <strong>False</strong></td>
<td>(see <a href="#">Configuring Other Settings</a>). Changing it to <strong>True</strong> recalls the shipped item first, rather than the locally loaned copy. Recalls are supported if the borrowing workflow profile includes the <strong>Recall</strong> item (see <a href="#">Configuring Workflow Profiles</a>). In that case, borrowing requests display a new action, <strong>Recall</strong>. For more information about the recalling resource sharing requests, see the <a href="#">Resource Sharing Request Recalls</a> video (7:33 mins).</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>General Message</td>
<td>Send a general message with a borrowing request to a lender (see <a href="#">Sending a General Message With a Resource Sharing Request</a>).</td>
</tr>
<tr>
<td>Reject</td>
<td>Mark a request rejected by the lending institution as <strong>Rejected</strong> (see <a href="#">Rejecting a Borrowing Request</a>). Reject is only visible if the workflow option <strong>Reject</strong> is enabled.</td>
</tr>
<tr>
<td>Return</td>
<td>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 <strong>Lender check in</strong> option, the request status is changed to <strong>Returned item to partner</strong> (see <a href="#">Configuring Workflow Profiles</a>). 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 <a href="#">ISO ILL: Lender Checked-in Message</a> video (8:35 mins).</td>
</tr>
<tr>
<td>Externally Obtained</td>
<td>Sends a request using the GetItNow service. See <a href="#">Sending a Request for a CCC GetItNow Resource</a>.</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 <a href="#">Borrowing Locate Process</a>.</td>
</tr>
<tr>
<td>View Local Resources</td>
<td>If local resources exist but a borrower creates a resource sharing request, you can view the local resources for the request (see <a href="#">Viewing Local Resources on a Borrowing Request</a>).</td>
</tr>
<tr>
<td>Recalculate Rota Assignment</td>
<td>To attach a rota to a request based on configured rota assignment rules, click the Recalculate Rota Assignment link to attach the rota to the request according to the configured rules (see <a href="#">Configuring Rota Assignment Rules</a>).</td>
</tr>
<tr>
<td>Reassign</td>
<td>Reassign a task to another user (see <a href="#">Reassigning a Task</a>).</td>
</tr>
<tr>
<td>Release Assign (on the Assigned to Me tab)</td>
<td>Move the task from the Assigned to Me tab to the Unassigned tab.</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>Link</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Resend Patron Email</td>
<td>For digital requests with document delivery, the email may be resent to the patron.</td>
</tr>
<tr>
<td>More details</td>
<td>Opens a pop-up window displaying additional details about the request that are not displayed in the request's listing on the Resource Sharing Borrowing Requests page.</td>
</tr>
</tbody>
</table>

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

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

### 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:**


   ![Assign To Dialog Box](image)

   **Assign To Dialog Box**

   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. Click **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.

![Email Message Dialog Box](image)

**Email Message Dialog Box**

• 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 click **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](image)

**Select E-Mail Template Dialog Box**

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

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 clicking Edit or View for the request.

General Messages can be sent only if:

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

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

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:


2. In the Message field, enter a message and click Send. The message is sent to the lender. 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 click Edit. The Resource Sharing Lending Request page opens.

4. Click 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, click 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 clicking the Active General Messages link in the General Messages facet on the left side of the Resource Sharing Lending Requests Task List or Resource Sharing Borrowing Requests page.

You can also access active general messages by clicking 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.

![Self-ownership Pop-up](image)

2. Click View Local Resources to bring up a listing of the matching local resources.

![Local Resource List](image)

3. Click Request from the local item to abort the borrowing request and create a local request. The following confirmation message appears.
4. Click **Confirm Request** on the resource listing ([Local Resource List](#)) or **Confirm** on the self-ownership pop-up ([Self-ownership Pop-up](#)) if you would like 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. When you click **Request**, the following message appears:

---

### Viewing Borrowing Request Actions

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

The Audit 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. Click the **Audit** tab. The Audit tab page displays the list of actions performed on the resource sharing borrowing or resource sharing lending request. The view mode may be selected (**Brief** or **Full**) from the drop-down list in the **Audit**
Rejecting a Borrowing Request

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

To reject a request in the borrowing institution, 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 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.

To mark a request as rejected by the lending institution:

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 Audit 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 **Audit** tab (i.e. – **Only in reading room**).

4. Optionally, click **Notify user** to send a notification to the requesting patron regarding the rejection.

5. Click **OK**. The request’s citation status changes to **Rejected the borrower request**, and the **Reject reason** and **Reject note** are displayed in the Notes tab for the request. (Click the **Edit** link for the request to view the Notes tab. 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 have 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 requests 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):

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. Click Save and Add Members. The Template Members page appears.

5. Browse for a partner in the Partner field (you can select multiple partners) and click 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. Click Move Selected.

   Partners receive unfulfilled resource borrowing requests according to their order in the rota.

7. Click 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), click Actions then Add and select 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 click Choose:
   
   ◦ **Book** – The following page appears:
Resource Sharing Borrowing Request Page – After Book Selection

- **Article** – The following page appears:
3. 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.

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

<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>
</tbody>
</table>

**Note**

If you select a user for which a resource sharing library was assigned, the assigned resource sharing library displays in the **Owner** field. If multiple resource sharing libraries were assigned, the **Owner** field displays as a drop down field, where you select from the assigned resource sharing libraries. If no resource sharing library was selected for
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owner</td>
<td>The Alma resource sharing library that is responsible for the request. The displayed libraries are configured as resource sharing libraries in the General Configuration menu (see Managing an Institution and Its Libraries).</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong></td>
</tr>
<tr>
<td></td>
<td>If a user for which you assigned a resource sharing library is selected in the Requester field, the assigned resource sharing library displays in the Owner field. If multiple resource sharing libraries were assigned, the Owner field appears as a drop down field, where you select from the assigned resource sharing libraries.</td>
</tr>
<tr>
<td></td>
<td>If no resource sharing library was selected for the user specified in the Requester field, the Owner field displays the value configured in the ill_item_creation_lib_code field on the Customer Parameters Mapping Table page (Fulfillment &gt; Fulfillment Configuration &gt; Configuration Menu &gt; General &gt; Other Settings).</td>
</tr>
<tr>
<td></td>
<td>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).</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).</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>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). Click Add Partners to add a partner to the request’s rota, and click Add Rotas to add a rota template (group of partners). For details on adding partners, see step 6, below. For details on adding rota templates, see step 7, below.</td>
</tr>
<tr>
<td></td>
<td>▪ For details on configuring partners, see Resource Sharing Requests.</td>
</tr>
<tr>
<td></td>
<td>▪ 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>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| External identifier          | The identifying string provided by the external system. The identifier is sent to the partner.  
  ◦ When an NCIP or ISO partner is selected, a value can be entered manually  
  ◦ When an ARTEmail partner is selected, a value is generated automatically  
  
  **Note**  
  After creating the request, an Internal identifier value is displayed for borrowing requests of all status types, including those that were canceled or rejected. When there is no external identifier (such as for canceled or rejected requests), you can search for a request by the request's internal identifier.  
  
  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). |
| Preferred send method         | The preferred method of sending the item:  
  ◦ Ariel  
  ◦ Email  
  ◦ Fax  
  ◦ FTP  
  ◦ Odyssey |
| Date Needed By                | A date by which the item is required to be delivered |
| Delivery Location             | Location to which to deliver the item. Appears when the ARTEmail partner of the request supports adding an address.  
  Choose from:  
  ◦ **Deliver to library** – Delivers to the library indicated in the **Pickup at** field.  
    You can create relationships between libraries to enable the libraries to deliver items to each other (see Configuring Fulfillment Relationships).  
  ◦ **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). |
| Requested Pickup Location     | 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). |
| For Reading-Room Use Only     | Whether to restrict access to a reading room. The patron's requested pickup location is replaced with the selected reading room location.  
  See the Restricting Resource Requests to a Reading Room video (2:02 mins) for details about library-level invoices. |
| Shipping cost                 | 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). |
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<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.</td>
</tr>
<tr>
<td><strong>Note</strong></td>
<td>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.</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.</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>Whether to enable resource sharing with external systems. ▪ If you select this check box, when sending a request by ISO, the Copyright compliance field is set to US:CCL. ▪ If this check box is not selected, the Copyright compliance field is set to US:CCG. The copyright compliance is saved for the lender as a note.</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>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>
</tbody>
</table>
Field | Description
--- | ---
Level of Service | The requested shipping speed. To configure the available options, see Configuring Levels of Service.

For a description of the fields' display in Primo, see Citation Linker.

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

6. To add partners to a request's rota:
   1. Click **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)

   Resource Sharing Partner List Page

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

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

7. 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. Click **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 click Select. Alma sends the request to individual partners in the list until the request is fulfilled.

8. Click Save to save the request with the selected parameters, or click 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.

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

**Note**

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

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

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

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

---

### 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:**


   ![Repository Search Page: Add from Search](image)

2. Search for the item (see Searching in Alma).

   **Note**

   - You can select only All titles or Physical 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 click Select. The Request Attribute section on the Resource Sharing Borrowing Request page appears.
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></td>
<td>- Received – not for loan</td>
</tr>
<tr>
<td></td>
<td>- Rejected by partner</td>
</tr>
<tr>
<td></td>
<td>- Renew request not accepted</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>◦ Renew requested</td>
<td>◦ Renewed by partner ◦ Report damaged item to partner ◦ Report lost item to partner ◦ Request accepted ◦ Request completed – The request was delivered or it was canceled before it reached the hold shelf. ◦ Request sent to partner ◦ Returned by patron ◦ Returned item to partner ◦ Shipped digitally ◦ Shipped physically ◦ Waiting for cancel response ◦ Will supply</td>
</tr>
<tr>
<td></td>
<td>The value of this field is displayed as the <strong>Request Status</strong> on the Resource Sharing Borrowing Requests page.</td>
</tr>
<tr>
<td>Requested format</td>
<td>Select the format of the request: ◦ Digital ◦ Physical ◦ 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 <strong>True</strong> 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 <strong>Request Note</strong> 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: ◦ Ariel ◦ Email ◦ Fax ◦ FTP ◦ Odyssey</td>
</tr>
<tr>
<td>Date needed by</td>
<td>Select the date on which the item is needed from the <strong>Calendar</strong> 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. Choose from: ◦ Deliver to library – Delivers to the library indicated in the <strong>Pickup at</strong> field.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>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 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>
<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).</td>
</tr>
<tr>
<td>Copyrights Status</td>
<td>Select a copyright status or click Calculate Copyrights Status to the right of the drop-down list Clicking Calculate Copyrights Status automatically activates the Digitization Profile Rules (see Configuring Digitization Profile Rules) and applies the calculated value to the request. The calculated value is overridden from this page. Note that the same Digitization Profile 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 rs_borrower_copyright_management is set to True on the Customer Parameters Mapping Table (see Configuring Other Settings).</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 copyright terms</td>
<td>Select to enable resource sharing with external systems. ◦ If you select this check box, when sending a request by ISO, the Copyright compliance field is set to US:CCL. ◦ If this check box is not selected, the Copyright compliance field is set to US:CCG. The copyright compliance is saved for the lender as a note.</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: &quot;</td>
</tr>
</tbody>
</table>
Field Description

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.

**Note**

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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<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. Click **Add Partners** to add a partner to the request’s rota. See step 6 in Manually Adding a Request.

6. Click **Add Rotas** to add a rota template (group of partners). See step 7 in Manually Adding a Request.

7. Click **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**

New for December! 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

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. Click Go. The search results display on the page.

---

External Resource Search Page – Search Results

5. Select the resource from which you want to create a borrowing request and click 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 click 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**

New for December! 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. Click the Rota tab. The Rota page displays, showing the list of partners in the current rota.
   2. Click Add Partners. Click 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 click Select. The selected partners will be 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 click Add partners. The selected partners display on the page.

Note

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

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

Select the relevant option in the drop-down at the top of the page (Activate Notes or Dismiss Notes) to either assign notes as active or to dismiss displayed notes. Notes received from a peer member are automatically labeled as Active. Dismissed notes are excluded from the Activate Notes facet, but are still included with their respective requests (they are not deleted).

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 click Save.

To delete a note, select Delete from the row actions list for the note that you want to delete and click Confirm in the Confirmation Message pop-up window.

To locate a note in the list of notes, enter the text for which you want to search in the Find box and select the field—Created by, Modified by, or Note—in which you want to search for the text.

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

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

To add an attachment, click Add Attachment, click Browse in the File name field and select a file. Add a URL and/or note, if required, and click Add Attachment. The attachment 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 click Save Attachment.

To delete an attachment, select Delete from the row actions list for the attachment that you want to delete and click 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 click OK.

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

7. Click Save to save your changes.
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), click 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]

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

Sending a Request for a CCC GetItNow Resource

This enhancement allows libraries to use the CCC GetItNow service in a mediated manner, in cases where they do not want to have this as an open service to all patrons. It integrates seamlessly into the resource sharing workflow as detailed below.

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.

   Click **Add partners** and select a partner with a profile type External System.

2. **Click Send** for the request. The electronic portfolio page appears.
3. Click **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**

**YOU CAN:**
- Store this article in electronic form solely for your personal academic or research use (up to 120 days)
- "Mark it up" for personal academic or research use
- Print a copy of the article and use and store that printed copy indefinitely for authorized uses

**YOU CANNOT:**
- Remove copyright or trademark notices

I agree to these terms and conditions

[ACCEPT] [CANCEL]

![Copyright Clearance Center]

4. On returning to the resource sharing task list, a new action is available, **Externally Obtained**. Click 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]
5. Selecting the **Complete** box marks the request as **Completed** once you click **OK** to send this email to the patron. The following is a sample of the email.

**Resource Obtained Notification**

09/11/2015

Dear Sir/Madam,

We are happy to inform you that we obtained the resource you requested.

- **Title:** Mother-offspring relationship in the Neotropical burrowing crayfish Panstaurus pilarnos (Ven Matens, 1869) (Thermopoda, Panstauridae)
- **Author:**
- **Date:** 09/11/2015

Please find the URL below:

http://www.xref.com

Sincerely,

Resource Sharing Library

Shimon

Jerusalem

mschluba@hebrewu.edu

**QA - Provisioning**

**Patron Notification Email**

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 clicking 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.

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 clicks 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 (Ful Borrowing Info Letter) and a renewal fee may be charged. 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. 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, an ISO checked-in message is sent to the borrowing library and the request closes automatically. A checked-in ISO message is sent only if the active partner's workflow profile includes Checked In Message as a valid option (see Configuring Workflow Profiles).

**Workflow Actions**

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 clicking one of the following links in the Tasks List in the persistent menu (see Persistent UI-Elements):

- **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

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
      ▪ 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 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
  ◦ Up to a week ago – Requests created up to a week before the current date
  ◦ Up to a month ago – Requests created up to a month before the current date
  ◦ 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
◦ Owning Library – The library which owns the requested resource
◦ Level of Service – The level of service assigned to the request.

3. Click 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.

Note
These tabs include an indicator that turns blue when requests are available for that tab.
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 click one of the following buttons:

- **Change Status** – Change the status of the specified items. Select a status from the drop-down list and click **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. 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 (Resource Sharing Lending Slip Letter) for each of the selected items. For information about the slip, see the FullIncomingSlipLetter in Configuring Alma Letters.
- **Remove Requests** – Remove requests associated with the items. Click **Confirm** in the Confirmation Message dialog box to remove the requests.
- **Remove Alerts** – Remove alerts associated with the items. Click **Confirm** in the Confirmation Message dialog box to remove the alerts.

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

<table>
<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. Clicking <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>Manage fulfillment options</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>
</tbody>
</table>

**Note**

Assign an unassigned request to the current user.

Remove

Remove the request from the system.
<table>
<thead>
<tr>
<th>Link</th>
<th>Description</th>
</tr>
</thead>
</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 click the **Change Query** link to modify the search value.  
It is recommended to click **Edit** for a resource and update relevant information before clicking **Locate**. When a resource is located, the status changes to **Resource Located**. |
| Search               | Displayed for items for which **Resource Locate Status = No Resources Located**. Opens the search page, which enables performing a new resource search to locate the resource.                                                                                                                                                                         |
| Reject               | Reject a lending request (see [Rejecting a Lending Request](#)).                                                                                                                                                                                                                                                                          |
| Release assign       | Move the task from the **Assigned to Me** tab to the **Unassigned** tab.                                                                                                                                                                                                                                                                  |
| 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.  
Click the option to open the **Due Date** dialog box. Enter a due date and click **OK** to create the renewal. |
<table>
<thead>
<tr>
<th>Link</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print slip</td>
<td>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. For requests that have not yet been shipped, this option prints an incoming request slip (Resource Sharing Lending 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.</td>
</tr>
<tr>
<td>Ship non-returnable</td>
<td>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.</td>
</tr>
<tr>
<td>Ship item</td>
<td>Ship the item associated with the request. The Shipping Items page opens (see Shipping Items).</td>
</tr>
<tr>
<td>General Message</td>
<td>Send a general message with a lending request to a borrower (see Sending a General Message With a Resource Sharing Request).</td>
</tr>
<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>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.

---

**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 click Print Slip Report. The Print Slip Report Dialog Box appears.
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.

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

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

### 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. Click **Remove Alerts**.

3. Click **Confirm** in the Confirmation Message dialog box.

### Reassigning a Task

You can reassign a task only if you are assigned the task or if it is unassigned.

**To reassign a task:**

1. On the Resource Sharing Lending Requests Task List page (**Fulfillment > Resource Sharing > Lending Requests**), 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.

**Note**
The list of operators includes only those users who have the Fulfillment Services Operator role.

3. In the **Note** field, enter notes, as needed.
4. Select the **Send as e-mail** check box to notify the operator of the new assignment.
5. Click **Assign To**.

### Viewing Lending Request Actions

You can view the actions taken on resource sharing lending requests on the **Audit** 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.

![](image)

**Manage Resource Options**

**Note**
Clicking the **Manage fulfillment options** link assigns an unassigned request to the current user, even when clicking **Cancel** to exit the Manage Resource Options page without performing an action.
Select from the relevant service type on the Manage Resource Options page, as follows:

- **Electronic Services** — Click Document Delivery to open the Create Request page and enable delivery of the electronic item. The Request type field has the value **Ship digitally from electronic**. Enter the part to digitize and select the target destination in the relevant fields, add the date by which the item is needed in the Add Request Attributes section, and click Submit. The submitted request is displayed on the Manage Resource Options page.

![Manage Resource Options Page with Submitted Request](image)

- **Digital Services** — Displays the preservation type, revision number, and number of files for digital services. You can click Document Delivery and then select Attach to attach the resource to an email and send it digitally.

- **Physical Services** — Select View items from the row actions list to view items for the resource (see Working with the 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 clicking 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, click **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:**
   - **Ship physically:**
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>Holding (for journal requests)</td>
<td>Click or to select a holding from the Holdings List page.</td>
</tr>
<tr>
<td>Manual description (for journal requests)</td>
<td>Enter a manual description for 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>
</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.

**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. Click **OK**. The request turns to the next partner in the request’s rota (if one is configured – see step 3 in **Editing a Borrowing Request**). 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 (click the **Edit** link for the request to view the Notes tab).

If the request is managed using an ISO partner, an **Unfill** message is sent to the borrowing library, which marks the partner request as **Rejected** (see **Rejecting a Borrowing Request**).

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<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>
<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>
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. On the Scan In Items page (Fulfillment > Resource Requests > Scan In Items), ensure that you are at a Resource Sharing library; see Switching Library Desks/Departments.

2. In the **External Identifier** field, select **Yes**.

3. Scan an item barcode and a request ID of the resource sharing item in the relevant fields.

4. Click **OK**. The item is scanned into the Resource Sharing Library and displays at the bottom of the page. The item’s status updates to **Shipped** and the item is sent to the borrowing partner.
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), click 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](image)

   - 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. Click 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**

New for December! 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:


   ![Repository Search Page: Add from Search](image)

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 click Select. The Request Attribute section on the Resource Sharing Lending Request page opens.

   ![Resource Sharing Lending Request Page – Request Attribute Section](image)

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>
</tbody>
</table>

Ex Libris, a ProQuest Company
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="Image" /></td>
<td><img src="description1.png" alt="Description" /></td>
</tr>
<tr>
<td><img src="image2.png" alt="Image" /></td>
<td><img src="description2.png" alt="Description" /></td>
</tr>
<tr>
<td><img src="image3.png" alt="Image" /></td>
<td><img src="description3.png" alt="Description" /></td>
</tr>
<tr>
<td><img src="image4.png" alt="Image" /></td>
<td><img src="description4.png" alt="Description" /></td>
</tr>
<tr>
<td><img src="image5.png" alt="Image" /></td>
<td><img src="description5.png" alt="Description" /></td>
</tr>
<tr>
<td><img src="image6.png" alt="Image" /></td>
<td><img src="description6.png" alt="Description" /></td>
</tr>
<tr>
<td><img src="image7.png" alt="Image" /></td>
<td><img src="description7.png" alt="Description" /></td>
</tr>
<tr>
<td><img src="image8.png" alt="Image" /></td>
<td><img src="description8.png" alt="Description" /></td>
</tr>
<tr>
<td><img src="image9.png" alt="Image" /></td>
<td><img src="description9.png" alt="Description" /></td>
</tr>
<tr>
<td><img src="image10.png" alt="Image" /></td>
<td><img src="description10.png" alt="Description" /></td>
</tr>
</tbody>
</table>

The value of this field is displayed as the Citation Status on the Resource Sharing Lending Requests Task List page.

- **External identifier (Required)**: Enter the identifying string supplied by the external system.

- **Format**: In the Format drop-down list, select the format of the request:
  - Digital
  - Physical
  - Physical non-returnable

- **Requested media**: 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.

- **Allow Other Format**: If the requested format is unavailable, this indicates whether the patron is willing to receive the item in another format.

- **Language**: This is the language that is requested by the patron in the borrowing request.

- **Copyright Status**: Reflects the borrower side copyright status (if the borrower support copyright statuses). The borrower value will be automatically populated for ISO requests.

- **Shipping cost**: Enter a shipping cost for the request. The displayed currency is the default currency of the institution.

  If a shipping cost lender rule is configured, it is applied to the shipping cost of the request (see Configuring Shipping Cost Lender Rules).

- **Date needed by**: Select the date on which the item is needed from the Calendar dialog box.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| Request note  | Enter any notes for the request. When editing a request, this field contains a note for the shipped item, as sent to Alma by the NCIP source system in the NCIP message’s shipping note. The shipping note displays in the following format:  
|||Shipping Note||<text of shipping note>||Shipping Note|| The shipping note is used by NCIP implementers, such as OCLC Navigator, to update the library system with additional information about shipped items such as information about the resource itself, the requester, and the locations from where it is requested and is to be picked up.  
When configuring an ISO partner and selecting the Send requester information check box on the Resource Sharing Partner page Parameters tab (see Partner Parameters), this field displays the requesting patron’s information in the following format:  
|||<Patron Name>||<Patron Identifier>||<Pickup Location>|| The patron’s requesting information is sent with the ISO request. |
| Requester email| Enter an email address if a digital request is sent (when the configured Request status on the Resource Sharing Borrowing Request page is Shipped Digitally – see Manually Adding a Borrowing Request). The document is delivered to this email.                                                                                                  |
| Level of Service| The requested shipping speed. To configure the available options, see Configuring Levels of Service.                                                                                                                                                                                                                                    |

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 click 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. Click 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.
- New for December! 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 actions row 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 holdings codes to a library, so that the locate process completes successfully when any of the assigned holdings codes are matched. 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.

When using an Alma locate profile, the borrowing locate process' behavior depends on the following:

- If the lender and requester share the same Network Zone, there is no BIB 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 network zone members that own the resource.
  - For partners whose institution ID is part of the same network zone 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.

- 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.

- **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).

You 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.
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, click Edit for a request), click the Locate button.

- On the Resource Sharing Borrowing Requests page (Fulfillment > Resource Sharing > Borrowing Requests), click the Locate Resource action. This link displays only if the request has an assigned partner or rota.

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 is more than one match or no matching results. 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 click 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 share the same Network Zone or Fulfillment Network and the request has been placed using the network zone record or a Primo de-duplicated record.
- 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, click the Summary tab).
- Selecting Check item availability allows Alma to skip a partner if it the requested item is unavailable. This option is available only for Alma locate profiles. The item will be checked for availability. Using this option will cause the borrower workflow to entirely skip lenders that do not have an available item.
- Selecting Check item requestability allows Alma to skip a partner if it the requested item is not requestable. This option is available only for Alma locate profiles. The item will be checked for requestability as per the Is Requestable for Resource Sharing policy. Using this option will cause the borrower workflow to skip lenders with items when the policy does not allow for resource sharing requests.
- 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 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, click 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 [Switching Library Desks/Departments](#).

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. By default, this check box is selected.

   **Note**

   This notification is relevant only for physical resources.

4. Optionally, add a note in either or both of the following fields: This note appears in the following format:
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 Audit 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 Audit tab (i.e. – Only in reading room).

5. Enter a barcode or an external identifier for the received resource in the Barcode or External identifier field and click 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 Yes to automatically print the Resource Sharing Receive Slip Letter, (see Configuring Alma Letters) The option defaults to No. The selection is remembered for the duration of the session. When set to Yes, if multiple items are being scanned, a print slip is generated for each barcode.</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>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Location</td>
<td>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 <strong>Default Location</strong> field on the Resource Sharing Partner page Parameters tab (see <a href="#">NCIP Parameters</a>).</td>
</tr>
<tr>
<td>Fulfillment note</td>
<td>Enter a note, as required.</td>
</tr>
<tr>
<td>Due date</td>
<td>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 <a href="#">Receiving Items</a>).</td>
</tr>
<tr>
<td>Internal note</td>
<td>As described in step 4 above.</td>
</tr>
<tr>
<td>Note to partner</td>
<td>As described in step 4 above.</td>
</tr>
<tr>
<td>Shipping Cost</td>
<td>The shipping cost is defined in the relevant policy. It may be overridden by changing the value at this point.</td>
</tr>
<tr>
<td>Patron Receive Cost</td>
<td>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.</td>
</tr>
<tr>
<td>Patron Request Cost</td>
<td>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.</td>
</tr>
<tr>
<td>For Reading-Room Use Only</td>
<td>Select to restrict access to a reading room.</td>
</tr>
</tbody>
</table>

**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**.

6. 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**. For more information about non-returnable requests, see the [Non-Returnable Borrowing Requests video](#) (4:26 mins).

7. If the lender is an ISO 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:

- Click **Cancel** to return to the Received Items page and modify the due date. When you fix the due date, the item displays on the Resource Sharing Borrowing Requests page with the status **Physically Received by Library**.
- Click **OK** to retain the insufficient due date. The item displays on the Resource Sharing Borrowing Requests page with the status **Received - not for loan**, indicating that the item has been received by the Resource Sharing Borrowing Library, but cannot be loaned.

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**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 enabled resource sharing libraries. When an ISO request is sent, it includes the Shipping address as the address to which the request should be shipped. The ending institution, when shipping digitally, ships to this address. For more information about configuring the shipping address, see **Managing Institution/Library Contact Information**.

The fields displayed on the Shipping Items page depend on the selected Shipping Format.

---

**Shipping Items Page - Physical format**

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, locate the Automatically Print Slip field and select Yes to automatically send 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.

You can manually print a shipping slip by clicking 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).

For information about the Resource Sharing Shipping Slip Letter, see Configuring Alma Letters.

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 Switching Library Desks/Departments.
- 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 Audit 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 Audit 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. Click OK next to either the Scan item barcode or Scan request ID fields. The item is located and displays on the bottom of the page.

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. Click the **Done** button at the end to indicate that all parts of the request have been scanned, and send a hold shelf notification to the patron. Clicking 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. Clicking the link opens the request to the **Received Items** tab.
When selecting the Return action, the Return pop-up window indicates that this is a multi-item request.

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 click OK. A pop-up appears indicating that the request is already received.

2. Click Confirm. A pop-up appears to enter the barcodes. Enter the barcodes one at a time and click 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. Click 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.
Shipping Items

After checking the **Multiple items** check box and scanning the first item's barcode, the multi-item window displays.

![Multi-item Window](image)

**Multi-item Window**

For each item, the barcode is scanned. When all items are done, click **Done**. The lending request status changes to **Shipped Physically** and the barcode is displayed as **Multiple barcodes**.

![Lending Request Task List](image)

**Lending Request Task List**

Clicking the Multiple Barcodes links opens the lending request to a new tab, Items.

![Lending Request - Items Tab](image)

**Lending Request - Items Tab**

When shipping to an ISO partner, one Shipped ISO message is transmitted. When the borrowing institution receives the message, it is recorded in the Audit 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 or Libris (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 User Identifiers.

- **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

- **Disable service when**: <The parameters upon which the service is to be disabled>

- **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

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:
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.

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. 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 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.

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.

For information on course reserves, see the Course Reserves video (1 hour 4:42 mins).
Managing Courses

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

- Course Reserves Operator/Manager attached to a course department
- Fulfillment Services Operator/Manager attached to a course department

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). The Courses page lists all the courses that have been created for an institution.

Adding a Course

To add a course to a department and define its attributes:

1. On the Courses page (Fulfillment > Course Reserves > Courses), click Add Course. The Manage Course Information page opens.
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 code to be assigned to the course</td>
</tr>
<tr>
<td>Name (Required)</td>
<td>The name to be assigned to the course</td>
</tr>
<tr>
<td>Processing department (Required)</td>
<td>The department that contains 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>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.</td>
</tr>
<tr>
<td>Academic department</td>
<td>The academic department that contains the course 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 to be taught from the Terms list drop-down list. Note that an administrator can delete and/or rename options in the list (Configuration Menu &gt; Fulfillment &gt; Courses &gt; Course Terms).</td>
</tr>
<tr>
<td>New for December! Submit Lists By (Leganto only)</td>
<td>Set this date to ensure that instructors send you their reading lists for processing with enough time to process them before the course begins. The notification about the submit by date appears in Leganto for all reading lists associated with the course.</td>
</tr>
<tr>
<td>Status</td>
<td>The status of the course:</td>
</tr>
<tr>
<td></td>
<td>- <strong>Active</strong> – The course is currently being taught</td>
</tr>
<tr>
<td></td>
<td>- <strong>Inactive</strong> – The course was taught, or will be taught, but is not currently being taught</td>
</tr>
<tr>
<td>Note</td>
<td>Course data for inactive courses is not published to Primo (see The Format of Published Data).</td>
</tr>
<tr>
<td>Start date</td>
<td>The start date from the calendar dialog box. The current date is the default date.</td>
</tr>
</tbody>
</table>
### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| End date             | The end date from the calendar dialog box. This date cannot be earlier than the start date.  

**Note**  
The course’s end date is transferred to the course’s reading lists.  

<table>
<thead>
<tr>
<th>Number of participants</th>
<th>The number of students that are enrolled in the course.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weekly hours</td>
<td>The number of hours the course is taught per week.</td>
</tr>
<tr>
<td>Year</td>
<td>The year the course is given.</td>
</tr>
<tr>
<td>Searchable IDs</td>
<td>Additional IDs for the course, Used for search indexes in Primo and external systems.</td>
</tr>
</tbody>
</table>

**Instructor**  
On the Instructor tab, browse for the instructor of the course (the list consists of all Alma users), and click 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.

New for December! (Leganto only) By default, instructors appear to student and guest users in a pane in Leganto 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.

New for December! (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 > Courses, select Reading List in the row actions list for a course).

3. Click **Save**. The course material is saved and the course appears on the Courses page.

**Note**  
The modification of 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 click **Save**. The new course appears on the Courses page.
Editing a Course

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. New for December! 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 Configuring Course Loading.
2. Modify the course information as required; see Adding a Course. You can also add notes in the Notes tab (see Editing a Reading List).
3. Click 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.

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).

To reorder how the courses appear in Leganto, click the up/down arrows in the Move Down/Move Up columns.

For details on working with reading lists, see Managing Reading Lists.

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 click 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.

---

### Deleting a Course

**To delete a course:**

On the Courses page (Fulfillment > Course Reserves > Courses), select Delete in the row actions list for a course, and click 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
- 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). New for December! In addition, the page has an All tab that contains all of the reading lists that appear in the other tabs.

New for December! You can also access this page by searching for reading lists; see Searching in Alma.

You can also access this page by clicking one of the following tasks in the task list (see Tasks in the Task List):

- Reading lists - unassigned - Complete (<count>) - View the Unassigned tab, with the Status filter set to Complete
- Reading lists - unassigned - Processing (<count>) - View the Unassigned tab, with the Status filter set to Processing

Note

The filter status Processing matches any reading list that is not marked as Complete, including Inactive or Declined.

- Reading lists - assigned to me - Ready for processing (<count>) - View the Assigned to Me tab, with the Status filter set to Ready for processing
- Reading lists - unassigned - citation with new note (<count>) - View the Unassigned tab, with the Alert filter set to Citation has a New Note
- Reading lists - assigned to me - citation with a new note (<count>) - View the Assigned to Me tab, with the Alert filter set to Citation has a New Note
The fields on this page are as follows (note that not all columns appear by default; select the columns to appear in the list in the Columns drop-down):

- **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.)
- **Owners** - The reading list's owners; ownership is relevant only to Leganto customers (see Configuring Reading List Ownership)
- **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
- **Academic Department** (hidden by default) - The course’s academic department
- **New for December! Request for Review** (Leganto only) - The date that the instructor submitted the list to the library for processing
- **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)
- **Reading List Visibility** (Leganto only; hidden by default) - The read list’s publication status in Leganto (visibility)

**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.

On the Reading Lists Task List page, 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.
In general, you manage reading lists using the **Status**, **Alerts**, **Publication Status** (Leganto only), and **New for December! Last Modification Date** (range) filters. For more information on citation alerts and these filter values, see Managing **Citations**. For publication status, **Active** matches all reading lists that are not **Archived** or **Deleted**.

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**.

- **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.

- **Delete** - Select **Delete** in the row actions list and click **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 ). Otherwise, the reading list is immediately purged from Alma. Not relevant for deleted lists.

- **New for December! 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.

- **New for December! Restore** - Select **Restore** in the row actions list. Restores a deleted list; this action cannot be undone. Relevant for deleted lists.

---

**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.

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.
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. Click 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 Additional 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. Click 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.
• 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.

On the Reading Lists Task List page (Fulfillment > Course Reserves > Reading Lists), 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 click Change Course Association.

Course Association Pane

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), click 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](#).

- If your institution has Leganto enabled, you can perform the following Leganto-related tasks (for more information, see [Leganto Administration Guide](#)):
  - Edit the reading list's visibility. 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 **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:
    - **All Students Restricted** - All students can view the list as a syllabus, but only course students can access the course materials
    - **Course Students** - Course students (only) can view the list and access the course materials (electronic citations and uploaded files)
    - **Anyone Restricted** - Anyone with a permalink can view the list as a syllabus, but only course students can access the course materials
    - **All Students Full** - All students can view the list and access the uploaded or electronic citations
    - **Anyone Full** - Anyone with a permalink can view the list and access the course materials
    - **Anyone Restricted, All Students Full** - Anyone with a permalink can view the list as a syllabus; all students can access the course materials
    - **Draft** - The list is not visible to students
    - **Archived** - Not visible in Leganto. The list becomes unassigned. You can unarchive the list on the Reading List Tasks List page (see above).
  - Set the visibility of the list (**Start Date / End Date**) in Leganto, if it is shorter than the course's active date range.
  - Lock/unlock the list in Leganto - Click **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 Leganto by any librarian or by the user who locked it.

---

**Note**

This setting does not affect the reading list's publication status in Primo.
Open this reading list in Leganto - click View in Leganto in the header.

- On the Citations tab, you can manage citations, as described in Managing Citations.
- On the Owners tab, you can manage Leganto owners or collaborators (see Configuring Reading List Ownership).
- Add, edit, or delete notes in the Notes tab. For information concerning editing, deleting, and locating notes, see Notes Tab. Select the relevant option in the drop-down at the top of the page (Activate Notes or Dismiss Notes) to either assign notes as active or to dismiss displayed notes. Notes received from a peer member are automatically labeled as Active. Dismissed notes are excluded from the Activate Notes facet, but are still included with their respective requests (they are not deleted).

After modifying the Edit Reading List page as required, click 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.

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. Click Assign To. The user is assigned to work on the reading list.
Managing Citations

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

- Course Reserves Operator/Manager
- Fulfillment Services Operator/Manager

Citations can be websites, 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.

**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 added using the Alma UI or the Alma Web service API are added to the default section of a reading list.
- Citations that are linked to active courses are published to Primo with course information included. The following can be retrieved by a Primo search: course IDs, course names, and instructor names. Note that for this information to be published to Primo, the **Course information enrichment** check box must be selected in the Primo publishing profile.
- For information about Ex Libris’s reading list/citation management system, see the Leganto [Product Overview](#).
- Adding or editing a citation may automatically trigger a purchase request (create a PO line); see [Configuring Automatic Purchasing Requests from Citations](#).

Citations can be linked to the repository/inventory items or not. Titles not linked to the repository are typically 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](#); click 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.
On the Edit Citations page, the citations appear as a repository list, with the most recently created citations appearing first. On the Edit Reading List page, citations appear in the order specified in the parameter `reading_list_citation_order`; see Configuring Other Settings. Actions are available in several groups. For more information about repository lists, and for information about how to configure the arrangement of the fields and citation actions, see Repository Lists.

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 alerts or physical or electronic 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.

- You can filter the list of citations using filters:
  - **Alerts** - By an alert type connected with the citation (appears only on the Edit Reading List page; see Removing alerts from citations)
  - **Citation/Locate Status** - By the citation (fulfillment) or resource locate status of the citation. For the list of statuses, see Reading List and Citation Statuses (citation/fulfillment) in the Leganto Administration Guide and Managing a Citation's Attachment to an Inventory Item (resource locate). Not Complete matches any citation whose status is not Complete.
  - **Material Type** - By the primary or material type of the citation
  - **Tags** - By a tag set on the citation (appears as Section Tags and Citation Tags on the Edit Citations page; see Adding Citation Tags)
  - **Copyright Status** - By the copyright status of the citation (see below).

The following filters are only available on the Edit Citations page:

- **Course Status** - Active or Inactive.
- **List Assigned to** - The user to whom the reading list is assigned.
- **List Visibility** (Leganto) - The publishing status of the reading list.
- **New for December! Citation Last Modification Date** - Enter a range of dates to match citations whose last modification is between these dates.
To manage one or more existing citations, select the check boxes next to the desired citations, or select the Select All check box, and then click 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 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.
- Remove Alerts - See Removing alerts from citations.
- Save - Click when you are done managing the citation.

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.
- 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.
- Citation Details - See Viewing information about a citation.
- More Info - See Viewing information about a citation.
- View - See Viewing information about a citation.
- View Source - See Viewing information about a citation.
- View It - See Viewing information about a citation.
- Recalculate Rules - See Automatically Managing a Citation's Copyright Status.
- License Through SIPX / View SIPX License / Remove SIPX License (Leganto only) - See Working with SIPX.
- Associate to DCS / Enter DCS URL / View DCS / Remove DCS - See Attaching a Citation to the CLA Digital Content Store (UK Only).
- Manage Digital Representations (Leganto only) - See Managing a Citation's Digital Representations. Appears only if the Leganto customer parameter display_digital_representations is set to false; see Configuring Digital Representation Display Options.
- Other Formats and Editions (Leganto only) - See Configuring the Display of Other Formats and Editions of Citations.
- To add a citation to a reading list on the Edit Reading List page, duplicate an existing citation or click one of the **Add** actions:
  - **Add Repository Citation** adds a citation and connects it to an item in the repository
  - **Add Non-Repository Citation** adds a citation that is not in the repository
  - **Add Brief** adds an item to the repository, and then adds a citation that is connected to it

After making any changes on the Edit Reading List page, click **Save** to save the changes and return to the Reading Lists Tasks List page. You do not have to save after making changes on the Edit Citations page.

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>
</tr>
</thead>
<tbody>
<tr>
<td>Adding a citation</td>
<td>See Adding Citations to a Reading List.</td>
</tr>
</tbody>
</table>

- Brief citation information appears in the list of citations. The brief information includes:

  To view additional information about a citation, click the **Citation Details** or **More Info** citation action. A pop-up window displays additional information about the citation (the target item, or the citation entry itself, respectively). You can click links in the pop-up window to view a citation's related inventory and related courses.

- **Title**
- **Type/material type**
- **Section name, if available**
- **ISBN/ISSN**
- **Series**
- **Subject**
- **Availability information**
- **Citation status (request status)** - See the list of statuses for a reading list in Adding a Reading List.
- **Resource locate status** - Whether the citation is matched to an inventory item. See Managing a Citation's Attachment to an Inventory Item.
- **Copyright status** - See Managing a Citation's Copyright Status.
- **License Type** - Appears if the type is CLA, SIPX, a creative commons type (varies by region), or self-declared.
- **Section name (Leganto only)** - The section within the reading list that contains the citation
- **Course name / Reading List (Edit Citations page only)**
- **Citation tags** - See Adding Citation Tags, below.
- **Created By / Modified By** - The user who created / last modified the citation, as well as the date and time that this occurred
- **Whether the citation is also in other reading lists**
  - **Demand in Other Lists, Same Course** - Other reading lists in this course also list the resource linked to this citation
  - **Demand in Other Lists, Other Courses** - Other reading lists in other courses also list the resource linked to this citation
- **Alerts about the citation** (see Removing alerts from citations)

- To view a citation’s items or portfolios, click 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.
Action | Procedure
--- | ---
 | **(Leganto only) To view the original source of a citation, click the View Source citation action. This action 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 uReolover link provided from Primo Central (the uResolver URL that is used for availability).
 | • For all other citations, the source field is not defined.
 | • To view the uploaded file of a citation, click the View citation action. This link appears only if an uploaded file exists.
 | • To view the OpenURL link resolver results of an article or a digital object, click the View It citation action. For an article, this link appears if the link resolved 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, click 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.

---

**Editing a citation**

You can edit a citation, for example to improve its metadata.

To edit a citation, click the Edit citation action. The Edit Reading List Citation page appears. Modify the information in the Citation tab and other tabs as required, and select Save. For information on the fields in the Citation 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 Save and manage approval, instead.

To add or edit citation notes while editing a citation, click the Notes tab, add, edit, or delete notes as required, and select Save. For more information, see Notes Tab. To deactivate the notes, select Update Notes > Dismiss Notes in the table actions list. To reactivate the notes, select Update Notes > Activate Notes in the table actions list.

---

**Adding citation tags**

Public tags appear when a patron views the citation in Leganto (Leganto customers only) and Primo. Library tags are internal, viewable only by other librarians (and, in Leganto, by instructors creating the reading list).

To add or edit citation tags, click the Tags tab while editing a citation, add or delete tags as required, select Save, and click Go. You can filter using these tags on the Edit Reading List page. To configure the available citation tags and their type, see Configuring and Section Citation Tags.

---

**Tags Tab**

After adding tags, they are visible in the list of citations on the Edit Reading List page. You can filter citations by tags.
<table>
<thead>
<tr>
<th>Action</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managing a citation's attachment to an inventory item</td>
<td>See Managing a Citation's Attachment to an Inventory Item.</td>
</tr>
<tr>
<td>Managing a citation's fulfillment options</td>
<td>See Managing Citation Fulfillment Options.</td>
</tr>
<tr>
<td></td>
<td>To see alternate edition suggestions for citations, run the Citation Alternate Suggestions job.</td>
</tr>
<tr>
<td>Attaching citation attributes to a citation</td>
<td>See Attaching Citation Attributes to Citations. Also see Editing a citation above for adding tags to a citation.</td>
</tr>
<tr>
<td>Printing slips for citations</td>
<td>See Printing Slips for Citations or Generating a Citation Print Slip Report.</td>
</tr>
</tbody>
</table>
| Changing a citation's status                            | 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 click Change Status.  
Alternately, to set a single citation's status to complete, click the Set Complete citation action.  
Alma comes with predefined statuses that cannot be changed. For information on configuring additional citation statuses, see Configuring Additional Reading List Citation Statuses. For the default list of citation statuses, see Reading List and Citation Statuses in the Leganto Administration Guide. |
| Changing a citation’s copyright status                  | See Managing a Citation's Copyright Status.                                |
| Changing the representations that appear for a digital citation in Leganto | (Leganto only) See Managing a Citation's Digital Representations. |
| Creating requests for citations                         | You can place requests on one or more citations in order to move the items (permanently or temporarily) or to 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 click 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 click 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  
To create a purchase request for a citation, click the Purchase Request citation action. For more information see Purchase Requests. |
### Action Procedure

<table>
<thead>
<tr>
<th>Action</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Removing alerts from citations</td>
<td>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.)</td>
</tr>
<tr>
<td></td>
<td>In this case, for each step in the citation request workflow, an alert is generated – for example, Citation Digitization Request In Process, Citation Digitization Request Completed. You can use the Alerts filter to monitor the status of physical items that you have requested to move to reserved areas or material that you have requested in digital format. For example, you can use the Alerts filter to view only those citations whose request processing has been completed (in order to mark their status as Complete). An alert also appears if an instructor added a library note to the citation in Leganto. The possible alerts are:</td>
</tr>
<tr>
<td></td>
<td>• Citation Purchase Request Approved</td>
</tr>
<tr>
<td></td>
<td>• Citation Purchase Request Rejected</td>
</tr>
<tr>
<td></td>
<td>• Citation Purchase Request Submitted</td>
</tr>
<tr>
<td></td>
<td>• Citation Move Request In Process</td>
</tr>
<tr>
<td></td>
<td>• Citation Move Request Cancelled</td>
</tr>
<tr>
<td></td>
<td>• Citation Move Request Completed</td>
</tr>
<tr>
<td></td>
<td>• Citation Digitization Request In Process</td>
</tr>
<tr>
<td></td>
<td>• Citation Digitization Request Cancelled</td>
</tr>
<tr>
<td></td>
<td>• Citation Digitization Request Completed</td>
</tr>
<tr>
<td></td>
<td>• Citation has a New Note</td>
</tr>
<tr>
<td></td>
<td>• Citation Link Reported as Broken (Leganto only; see Enabling Broken Link Reporting)</td>
</tr>
<tr>
<td></td>
<td>To remove all alerts from citations, edit the citation, select Save, and click Go, or select the citations and click the Remove Alerts top action.</td>
</tr>
<tr>
<td></td>
<td>Note</td>
</tr>
<tr>
<td></td>
<td>If you are implementing Leganto, the alerts List was published/unpublished are special, non-workflow alerts added to the first citation in a reading list when an instructor publishes/unpublishes the reading list in Leganto.</td>
</tr>
<tr>
<td>Removing citations</td>
<td>Select the citations and click the Remove Citations top action. Click Confirm in the confirmation dialog box.</td>
</tr>
<tr>
<td></td>
<td>Alternately, click the Remove citation action.</td>
</tr>
</tbody>
</table>

### 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.

**To add a citation already in the repository:**

1. On the Edit Reading List page (Fulfillment > Course Reserves > Reading Lists; click the reading list) in the Citations tab, click 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 click 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.

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; click the reading list) in the Citations tab, click 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 click Choose. The Edit Reading List Citation page (for non-repository citations) appears, containing the fields for the selected citation type (see the following images).
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.

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, click 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, click **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.
   ◦ 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. In addition, the following fields are available:

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.
   ◦ 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.
   ◦ You can manually select a resource status; 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 click 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 click 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.

9. Optionally click 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.

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; click the reading list) in the Citations tab, click the Add Brief citation action.

Note

◦ The file is currently downloadable only in Alma and Leganto. 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.)
2. In the dialog box that appears, select the type of citation you want to create—physical book/article or electronic book/article—and click Choose. The Quick Cataloging page appears.

![Quick Cataloging Page – For Physical Book](image)

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 click Write to RFID and Save to save the new inventory to RFID.

---

**To add a citation by duplicating an exiting citation:**

On the Edit Reading List page (Fulfillment > Course Reserves > Reading Lists; click the reading list) in the Citations tab, click 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 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.

When attaching a citation to an inventory item, Alma adds missing information to the citation; for more information, see Appendix B: Repository Fields Used to Overwrite Citation Fields in the Leganto Administration Guide.

Note

- Note that this has nothing to do with OpenURL link resolving for an article, which is about finding links to external instances of the article.
- 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.

To remove this attachment, click 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 Matching Citations to Inventory in Bulk.

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; click the reading list) in the Citations tab, click 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.
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.

### 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**; click the reading list) in the **Citations** tab, click 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 clicking 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 clicking 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; click the reading list) in the Citations tab, click the Manage Fulfillment Options citation action. The Manage Resource Options page appears.

The link is available only if a resource was specified.

The following fields may appear on this page:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>The title of the citation</td>
<td></td>
</tr>
<tr>
<td>Author</td>
<td></td>
</tr>
<tr>
<td>ISBN (or ISSN)</td>
<td></td>
</tr>
<tr>
<td>Place of Publication</td>
<td></td>
</tr>
<tr>
<td>Chapter</td>
<td></td>
</tr>
<tr>
<td>Pages</td>
<td></td>
</tr>
<tr>
<td>Additional Person Name</td>
<td>An additional contact, if any</td>
</tr>
<tr>
<td>Year</td>
<td></td>
</tr>
<tr>
<td>Edition</td>
<td></td>
</tr>
<tr>
<td>Call Number</td>
<td></td>
</tr>
<tr>
<td>Note</td>
<td>A public note, if any</td>
</tr>
<tr>
<td>Alerts</td>
<td>Any alerts on the citation, if any</td>
</tr>
</tbody>
</table>

**Course Information Tab**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course Code</td>
<td></td>
</tr>
<tr>
<td>Section</td>
<td>The course section</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Course Name</td>
<td></td>
</tr>
<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>Demand for X courses with overall Y participants</td>
<td>The number of participants in all courses in which this citation appears</td>
</tr>
</tbody>
</table>

**Electronic Services – Electronic fulfillment information for the citation**

**Digital Services – Digital fulfillment information for the citation**

**Physical Services – Physical fulfillment information for this citation. Available row actions for each location include View Items, Request, and Update Move Expiry. See below the table for details.**

**This Record in Other Lists – Information about the bibliographic record of the citation as it appears in other reading lists. Available actions for each location include View and Place Request. See below the table for details. For each other reading list, the following fields appear for the citation:**

<table>
<thead>
<tr>
<th>Course Code</th>
<th>Course code of the other reading list</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course Name</td>
<td></td>
</tr>
<tr>
<td>Section Id</td>
<td>The course section</td>
</tr>
<tr>
<td>Academic Department</td>
<td></td>
</tr>
<tr>
<td>Processing Department</td>
<td></td>
</tr>
<tr>
<td>Instructor</td>
<td>The instructor who created the reading list</td>
</tr>
<tr>
<td>Start Date</td>
<td>The start date for this course</td>
</tr>
<tr>
<td>End Date</td>
<td>The end date for this course</td>
</tr>
<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>Reading List Status</td>
<td></td>
</tr>
<tr>
<td>Section Name</td>
<td>The reading list section</td>
</tr>
<tr>
<td>Citation Status</td>
<td></td>
</tr>
</tbody>
</table>

At the bottom of the page you can view 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 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 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 click **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 click **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. You can also manually update a citation’s due back date when adding or editing a citation; see [Adding Citations to a Reading List](#).

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 click **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; click the reading list) in the Citations tab, click 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 click **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; click the reading list) in the Citations tab, click the **Associate to DCS** citation action. The DCS Search page appears with the matching item or a list of matching items.
2. Use the secondary search to search for all or part of an author, title, DCS item ID (GUID), or identifier (ISBN / ISSN).

3. Locate the relevant matching item and click **Associate** in the row actions list. The citation is attached to the selected item and additional citation actions become available.

To manually attach a citation to the DCS when you have the specific DCS URL:

1. On the Edit Reading List page (**Fulfillment > Course Reserves > Reading Lists**; click the reading list) in the Citations tab, click the **Enter DCS URL** citation action. A dialog box appears.

   ![Enter DCS URL Dialog Box](image)

2. Enter the URL and click **Associate**, The DCS Search page appears with the matching item according to its GUID (see above).

3. Click **Associate**. The citation is attached to the selected item.

To view the citation in the DCS:

On the Edit Reading List page (**Fulfillment > Course Reserves > Reading Lists**; click the reading list) in the Citations tab, click 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; click the reading list) in the Citations tab, click 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. Click the **Citations Attributes** tab.

2. In the Citation Attributes section, click **Add**, select a citation attribute type and the citation attribute you want to map, and click **Add Citation Attribute**. The selected values appear in a table.

![Reading List – Added Citation Attribute](image)

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; click the reading list) in the Citations tab:

- Click the **Print Slip** citation action.
- Select one or more citations and click the **Print Slip** top action. A print slip is generated for each citation.

![Reading List Citation Print Slip](image)

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; click the reading list) in the Citations tab, select the citations and click the Print Slip Report top action. The Print Slip Report dialog box appears.

2. Select whether to send the report by email (Email or User) 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.
   - If sending to the printer, select the printer in the Printer field.

4. Optionally download the report by clicking Download.

5. To send the report to the selected destination, click 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; 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 (SIPX, 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 citation's where the 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
- 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

• **Waiting for CC** - Waiting for copyright clearance

You can configure the status that is selected by default for a new citation. See [Configuring the Default Copyright Status of Reading List Citations](#).

If you are implementing Leganto, an instructor can self-declare a citation's copyright or choose a Creative Commons license in Leganto. In addition, an instructor or librarian can manage copyright using SIPX, see [Working with SIPX](#).

---

# 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.

### To change the copyright status of one or more citations:

On the Edit Reading List page ([Fulfillment > Course Reserves > Reading Lists](#); click the reading list) in the **Citations** tab, select the citations, click the **Change Copyright Status** top action, select the status in the Change Copyright Status pop-up that appears, and click **Change Copyright Status**.

![Change Copyright Status](image)

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](#).

Alma uses digitization profile rules to automatically set the copyright status of a new citation (or an existing citation whose copyright attributes are changed) to **Approved** or **Rejected**, or to send an approval task to an operator. For more information, see [Configuring Digitization Profile 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 clicking **Recalculate Rules** beneath the citation on the Edit Reading List page. This is useful, for example, when you change the digitization profile 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 or by SIPX; 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.
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
- Matching Reading List Citations to Inventory 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.

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. Click 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 click Calculate Overdue Fine. The Overdue fine for given return date appears, indicating the fine that would be accrued if the item were returned on the indicated date and time.
5. Optionally, you can perform the following actions for the item:

- Click the link next to **Fulfillment Unit Name** to view and edit the item's fulfillment unit.
- Click the link next to **Fulfillment Unit Rule** to view and edit the item's fulfillment unit rule.
- Click the link next to **Terms of Use Name** to view and edit the item's Terms of Use.
- Click the **Request** tab to view the applicable policies to a request for the selected item by the selected user.
- Click the **Booking** tab to view the applicable policies to a booking request for the selected item by the selected user.

---

**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.
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.

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 Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Library (Required)</td>
<td>Select the library whose items' due dates you want to change.</td>
</tr>
<tr>
<td>Location</td>
<td>Select a location (from a list predefined by an administrator; see Configuring Physical Locations) within the specified library. If no location is selected, the job handles all locations for the selected library.</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>
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.

2. Click Change Bulk Due Date, and click 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>

Click View to view a report of the job. The Job Report page appears, displaying job details.
Click 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 Due Date Change 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.

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 Make Items Have Due Dates at the End of the Semester.
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](image)

- **Events** – Opens the Events Report page, displaying details of the events that occurred during the job processing.

  ![Events Report Page](image)
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), click 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.
- Due to a known issue, while performing loans through Offline Circulation, if the Item is currently on loan by another patron block in Block Preferences is set to Handle Automatically, it must be changed to another option. 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.

To upload offline loans and returns:

1. On the Offline Circulation List page (Fulfillment > Advanced Tools > Offline Circulation), click in the File name field and select the .dat file containing the list of loans and returns performed during connection downtime. The default location of the file (configured during the Offline Circulation utility installation) is: <Local Drive>\Alma Offline Circulation\OffCirc\files\OffCirc.dat

The file name appears in the File name field.

2. Click Upload and Validate File Content. The job appears in the table at the bottom of the page. Its status appears in the Status column.
To view details of a job, click **View** for the relevant job. The Job Report page appears, detailing the number of items processed successfully and unsuccessfullly.

**Offline Circulation List Page with Jobs**

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.

**Job Report Page – Offline Circulation Job**

**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/resources/alma/setup_offcirc.exe](https://developers.exlibrisgroup.com/resources/alma/setup_offcirc.exe). 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>
<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>

After you have downloaded the Offline Circulation application, you can perform loans and returns offline.
To perform loans and returns offline:

1. Click the **Offline Circulation** file in the C:\Alma Offline Circulation directory to run the utility. The following dialog box appears.

![Offline Circulation Interface](image)

2. Scan the borrower's library card to populate the **Borrower** and **Item barcode** fields.

3. Under **Choose transaction**, select **Loan** or **Return**.

4. Click **Loan** or **Return** to complete the transaction.

5. When all the transactions are completed, click **Save to File** to create a data file of all the transactions. The data file is saved to the C:\Alma Offline Circulation\OffCirc directory.

When your internet connection is restored, 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 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

You configure criteria for items requiring action on the Items Requiring Action page.

Files are created according to the criteria you define and are uploaded to an FTP site using the connection type you specify. From this location, you upload the files into a scanning device. The device is passed over resources and notifies you when a resource matches the criteria in one of the files.

This functionality can be used when taking inventory or creating shelf reports. It enables you to create lists of physical items which, according to Alma, should not be in a given shelving location. By comparing these lists against inventory actually found on the shelf, such as with a hand-held scanning device, you can identify items which may require some action – either to their current status in Alma (such as Lost or Missing) or to their physical location (such as items belonging to other libraries or items that are currently requested).

To create a file of items requiring action:

1. On the Items Requiring Action page (Fulfillment > Advanced Tools > Items Requiring Action), select the criteria for the items you want included in the file:
   - **S/FTP connection type** – Select a connection type, from a list predefined by an administrator (see Configuring S/FTP 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 is displayed, enabling you to select a library. Items that do not belong to the selected library are included in the file.

      A separate file is created for each library to which the items belong, and the code of the library is included in the file name.

   - **Items that are marked as missing**
   - **Items that have requests waiting for them**
   - **Items that are on loan**
   - **Items that are claimed to be returned**
   - **Loaned items that are lost**

      A file is created for each check box selected. Barcodes listed in the files/reports are items that, according to Alma, should not be on the shelf.

2. Click **OK** to create a job for the files. The job appears in the table at the bottom of the page.
Items Requiring Action Page

The files created by the job are automatically downloaded to the FTP server (according to the S/FTP connection type).

To view details of a job, select View from the row actions list for the relevant job. The Job Report page appears, displaying details of the job, including the number of items processed successfully and unsuccessfully.
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. Click Run, and click Confirm in the confirmation dialog box. The job appears in the table on the Transfer Requests page.

![Transfer Requests Page](image)

5. Click 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 a 1- to 7-day period. This report allows you to specify the following filters:

- **Received by library** – Filters by the library at which the fine/fees were paid. This filter cannot be used for reporting waive actions.
- **Received by circulation desk** – If a library is specified, filters by the circulation desk at which the fine/fees were paid. This filter cannot be used for reporting waive actions.
- **Transaction types** – Filters by the type of transaction:
  - **Payment and Waive** – includes both payments and waivers
  - **Payment** – includes only payments
  - **Waive** – includes only waivers
- **Fine owner** – Filters by the owner of the fine/fee, which may or may not be the same location where the fine or fee was paid or waived.

Reports can be sent to a specific user or printer.

**To create a Fines and Fees Report:**

1. On the **Fulfillment > Advanced Tools** menu, click **Create Fines and Fees Report**.

The Fines and Fees Report page appears.

2. Enter the following information to set up the report:
   - **From date** – Specify the start date of the report. By default, it is set to the current date.
   - **To date** – Specify the end date of the report. By default, it is set to the current date.

**Note**

If you specify more than a 7-day period, an error message appears.
3. Specify any of the filters listed above and the destination of the report (Printer or User).

4. Click Run Now.

The report is sent to the specified report receiver.

Sample Fines and Fees Report

<table>
<thead>
<tr>
<th>Date</th>
<th>Item ID</th>
<th>Item Description</th>
<th>Amount</th>
<th>Library</th>
<th>Due Date</th>
<th>Paid Date</th>
<th>Payment Type</th>
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<tr>
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<td>Item2 Description</td>
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<td>Library2</td>
<td>2023-02-16</td>
<td>2023-02-23</td>
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<tr>
<td>2023-02-24</td>
<td>Item3</td>
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<td>Library3</td>
<td>2023-02-17</td>
<td>2023-02-24</td>
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</tbody>
</table>
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.
Matching Reading List Citations to Inventory in Bulk

To run the citation inventory enrichment 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 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.

You can match inventory to citations in bulk by running the Citation Inventory Enrichment job page (Fulfillment > Advanced Tools > Bulk Citation Inventory Enrichment).

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

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 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. Click Run Citation Inventory Enrichment Job and click 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). Click Refresh to update the page.

When the job completes, click 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.

---

**Note**

The job also (re)connects to inventory any citations that were manually disconnected from inventory.
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) allows the user to resend printouts or emails from the attachments that were sent previously.

Resend Printouts/Emails Page

The run parameters include:

- From Date - Select the beginning of the date and time range to filter.
- To Date - Select the end of date and time range to filter.
- Printer Owner - The institution and its libraries are listed.
- Printer Name - The printers for the selected institution or library are displayed.
- Job ID - The job ID of the original job.
- Printout/Email Type - the list of letters that may be resent from this interface:
  - Borrowed By Letter
  - Borrower Overdue Email Letter
  - Borrowing Activity Letter
  - Courtesy Letter
  - Document Delivery Notification Letter
  - Fine Fee Payment Receipt Letter
  - Fines And Fees Report Letter
  - Ful Borrowing Info Letter
  - Ful Cancel Email Letter
  - Ful Cancel Request Letter
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. Click Run Citation Alternate Suggestions Job and click 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). Click Refresh to update the page.

The job report includes the number of records processed, suggestions, and failed citations.
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 Fulfillment Activities – Overview

Fulfillment represents the culmination of many of the library’s processes and patron-facing activities, such as organizational infrastructure, acquisitions, and user management. The infrastructure for the fulfillment workflows (which include loaning, requesting and the handling of requests, returning, reading rooms, and course reserves) involves the configuration of the following:

- Locations, circulation desks, and fulfillment units
- Service relationships and transit times between these units
- Policies and rules for loans and requests
- Resource sharing partners
- Printers

This section describes how to configure the various fulfillment functions. See the Alma Glossary for definitions of these functions.

Fulfillment activities are configured in Alma according to location. You configure the various fulfillment activities from the Fulfillment Configuration page (Fulfillment >Fulfillment Configuration > Configuration Menu).

On the Fulfillment Configuration page, the following appears:

- A filter option, enabling you to display the configuration options for the institution or libraries within the institution
- A list of the available configuration items

The following table lists the configuration options.

<table>
<thead>
<tr>
<th>Configuration Options</th>
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<tbody>
<tr>
<td><strong>Section</strong></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 > Fulfillment > Library Management > 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)
- Editing Organizational Unit Relationships (see Editing 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 a another library in an institution, see Configuring Fulfillment Relationships.

4. Click Add and Close to close the dialog box. The relationship you defined is listed under Library Relationships on the Organizational Units Relationships Setup page.

Editing Library Relationships

You can edit organizational unit relationships.

To edit an organizational unit relationships:

1. On the Organizational Units Relationships Setup page (Configuration Menu > Fulfillment > Library Management > Relationships), select Delete from the row actions list for an entry. The Edit Relation page appears.
2. Modify the relevant fields, as described in step 3 of Adding Organizational Unit Relationships.
3. Click Save.

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).
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 Delete from the row actions list)
- Deleting a transit time rule (select Delete from the row actions list)
- Editing the default transit time rule (see Editing the Default Transit Time 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.
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, enter the delivery time (in hours) that it will take to deliver the item when the specified input parameters are fulfilled.

5. Click **Save**. The rule you defined is listed at the bottom of the list of rules on the Transit Times Rules page.

### Editing the Default Transit Time Rule

The default transit time rule defines the delivery time when none of the transit time rules is met. The default transit time rule is specified in hours.

**To edit the default transit time rule:**

2. In the Transit Time Rules Editor section, modify the default rule name and description, if required.

3. In the Output Parameters section, enter the length, in hours, of the default delivery time.

4. Click Save. The modified default rule details are displayed on the Transit Time Rules page.

Calculating the Estimated Time of Arrival For a Resource

You can calculate the ETA of a resource that is to be transferred from one location to another. The ETA indicates in how many hours the resource will arrive at the destination location, and is based on the transit time rules that are defined for the source and destination locations. If none of the defined transit time rules is satisfied, the default transit time rule is applied. Calculating the ETA is useful in testing the rules that have been defined.

To calculate the estimated time of arrival for a resource:


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. Click Calculate ETA. The calculated ETA is displayed in the Delivery time field.
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
- Fulfillment 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.

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. New for December! 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.

   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. New for December! 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 configure additional search fields by which you want resources to be searched for in the resource sharing library. The page refreshes and displays the new search fields.

The page displays the new 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. Click **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 (see step 3 in To configure resource sharing library information:).

**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. Click **Send**. The **Request Status = Request sent to partner**.
3. To receive the requested resource, click **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**).
Click the circulation desk code or name headings to sort the list alphabetically—in ascending or descending order.

The following actions can be performed on this page:

- Adding a circulation desk (see Adding a Circulation Desk)
- Editing a circulation desk (select Edit from the row actions list)
- Deleting a circulation desk (select 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),
   click Add Circulation Desk. The Circulation Desk – General Information page appears. This is the first page of a five-page wizard.
Circulation Desk – General Information Page
Note
You can create a new circulation desk by creating a copy of an existing circulation desk. Select **Duplicate** from the row actions menu 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>
</tr>
</thead>
<tbody>
<tr>
<td><strong>General Details:</strong></td>
<td></td>
</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 <a href="#">Configuring Fulfillment Relationships</a>.</td>
</tr>
<tr>
<td>Reading room desk</td>
<td>Select this check box if the circulation desk serves a reading room.</td>
</tr>
<tr>
<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>
</tr>
<tr>
<td></td>
<td>• When a patron checks a resource in to a reading room, the patron must specify the check-in mode:</td>
</tr>
<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>Note</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>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Location to move items to</th>
<th>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.</th>
</tr>
</thead>
<tbody>
<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>
</tr>
<tr>
<td>Note</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>
</tr>
<tr>
<td>Supports personal delivery</td>
<td>Select this check box to indicate that the circulation desk can process personal delivery requests for users.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------</td>
<td>-------------</td>
</tr>
<tr>
<td><strong>Note</strong></td>
<td>If personal delivery is configured for a patron and the desk at which the <strong>Receive</strong> 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 <strong>Deliver To</strong> relationship with the receiving resource sharing library. If no such library exists, the item is moved to the hold shelf.</td>
</tr>
</tbody>
</table>

### Additional Information:

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong></td>
<td>A textual description of the circulation desk.</td>
</tr>
<tr>
<td><strong>Map</strong></td>
<td>Not in use.</td>
</tr>
</tbody>
</table>

### Printing Information:

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Printer</strong></td>
<td>The printer that is associated with the circulation desk can be selected from the <strong>Printer</strong> list. The circulation desk prints all non-automated print jobs on this printer. Select a printer from the drop-down list.</td>
</tr>
<tr>
<td><strong>Creates return receipts</strong></td>
<td>Select for return receipts to automatically be printed at the circulation desk. For details on customizing the letter that accompanies the return receipt, see <a href="#">Configuring Alma Letters</a>.</td>
</tr>
</tbody>
</table>
| **Return receipt destination** | Displayed only when **Creates return receipts** is selected. From the drop-down list, choose the destination for the return receipt:  
  - **User preferred email**  
  - **Circulation desk printer** |
| **Creates loan receipts** | Select for loan receipts to automatically be printed at the circulation desk. For details on customizing the letter that accompanies the loan receipt, see [Configuring Alma Letters](#).  
Note that the receipt is triggered at the circulation desk when clicking **Done** to terminate a session with a patron or by clicking **Print Current Loans**. 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. |
| **Loan receipt destination** | Displayed only when **Creates loan receipts** is selected. From the drop-down list, choose the destination for the loan receipt:  
  - **User preferred email**  
  - **Circulation desk printer** |
| **Note** | If **User preferred email** is selected but no email exists for the user, the receipt will be printed to the printer instead. |

### Hold Shelf Information:
### Field Description

Select this check box if the circulation desk has a hold shelf. The following fields are then displayed:

- **Hold shelf sorting** – The criteria by which hold shelf items are sorted. Choose from the following options:
  - Call Number
  - Hold Shelf Expiry Time
  - Hold Shelf Placement Time
  - Requester ID
  - Requester Name
  - Title

  The value you select displays as the default option in the Sort by field on the Active Hold Shelf items page (see Managing Active Hold Shelf Items).

- **Maximum time on hold shelf (Days)** – The maximum number of days that an item can stay on the hold shelf.

  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 >= 5 The item can stay on the hold shelf for 3 days.

- **Has hold shelf processing** – Select to indicate that the circulation desk can store items that need to be processed before arriving at the hold shelf. Selecting this option displays the Place directly on hold shelf field in the following locations:
  - Scan In Items page – Scan In Items tab (see Scanning Items)
  - Scan In Items page – Change Item Information tab (see Scanning Items)

- Manage Item Returns page (see Returning Items)

---

**Note**

When using a self-check machine to return an item, if Has hold shelf processing is selected, the item goes directly to hold shelf processing. If Has hold shelf processing is not selected, the item is registered as returned and its status appears as Item In Place. It remains in the self-check machine’s bin and must be scanned in by an operator to activate the request.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Has hold shelf</td>
<td>Select this check box if the circulation desk has a hold shelf. The following fields are then displayed:</td>
</tr>
<tr>
<td>Notify patron of canceling expired hold</td>
<td>Select to notify the patron when their item on the hold shelf has expired.</td>
</tr>
<tr>
<td>Digitization Department:</td>
<td></td>
</tr>
<tr>
<td>Supports digitization</td>
<td>Select this check box if the circulation desk supports digitization. The Work time (days) field is then displayed; the value of this field indicates the number of days for which the item is unavailable (field is for informative purposes – this value is not binding).</td>
</tr>
<tr>
<td>Payment Information:</td>
<td></td>
</tr>
<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>
</tbody>
</table>
### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<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:

- **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](#).

2. Click **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.

   ![Circulation Desk – Physical Locations Page](image)

   **Circulation Desk – Physical Locations Page**

1. From the **Physical location type** filter, select to display all locations, or only closed, open, unavailable, or remote storage locations.

2. Click **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. Click **Attach Location** to add the selected location to the list of locations that are served by the circulation desk.

3. Click **Next**. The Circulation Desk – Work Order Types page 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. Click **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. Click **Add** to add the work order and enable adding another work order, or click **Add and Close** to add the work order and return to the Circulation Desk — Work Order Types page.

Add Work Order Dialog Box

5. Click **Save**. The circulation desk serves as a work order department for the indicated work order types.

4. Click **Next**. The Circulation Desk - Operators page 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. Click **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. Click **Add and Close** to close the dialog box. The selected operator is added to the list of operators of the circulation desk.

5. Click **Next**. The Circulation Desk – Automatic Printing page appears. This is the fifth and last page of the wizard. Use this page to specify the rules for automated printing of pick-up-from-shelf slips from the circulation desk.

Circulation Desk – Automatic Printing Page

1. Click **Add Rule**. The Automatic Printing Rules Editor page appears.
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 circulation desk's location is the archive and the requested material is a book, automatic printing is invoked according to the setting in the **Output Parameters** section.

4. Click **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. Click **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. Click **Save** to save your changes to the default rule.

4. Click **Save** on the Circulation Desk – Automatic Printing page to store all the circulation desk detail information that you entered and return to the Circulation Desks page. The new circulation desk appears in the list of circulation desks defined for the library.

---

**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.


![SIP2 Bin Configuration Rules Page](image)

**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.

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 (see Editing a SIP2 Bin Configuration Rule)
- 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:**


   **Note**
   
   If you want to create a copy of a SIP2 bin configuration rule, select Duplicate from the row actions menu. Once you have copied the rule, you can modify it as needed.

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:
## SIP2 Bin Configuration Rule – Input Parameter Values

<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 <a href="#">Configuring Libraries</a>.</td>
</tr>
<tr>
<td>Destination circulation desk</td>
<td>The circulation desk. For details on configuring circulation desks, see <a href="#">Configuring Circulation Desks</a>.</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 <a href="#">Configuring Work Order Departments</a>.</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 <strong>greater than</strong> 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>Reshelf item location</td>
<td>The library within the institution where you want to reshelve the item. For details on adding a library, see <a href="#">Configuring Libraries</a>.</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 <a href="#">Self-Check Machines</a>.</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 <strong>less than</strong> the indicated value.</td>
</tr>
</tbody>
</table>

4. Click **Add Parameter**. The set of input parameters is added to the list of parameters for the SIP2 Bin Configuration rule.

5. Repeat the previous two steps to add all of the required parameters for the rule.

**Note**

All the input parameters must be fulfilled for the rule to be applied.

6. In the **Output Parameters** section, enter a bin number – the number of the bin in which the self-check machine is to place the item. Ensure that the number here matches the number of a bin configured on the SIP2 machine.

7. Click **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. If no appropriate rule is found, the system will use the default rule.

---

## Editing a SIP2 Bin Configuration Rule

You can edit a SIP2 bin configuration rule.

**To edit a SIP2 bin configuration rule:**

1. On the SIP2 Bin Configuration Rules page (Configuration Menu > Fulfillment > Library Management > SIP2 Bin Configuration), select **Edit** from the row actions menu for the specific rule you want to edit. The SIP2 Bin Configuration page appears.
2. Modify the rule name and description as required.

Note

- You cannot edit an existing set of input parameters. To modify an existing set of input parameters, first delete the existing set, and then add a new set.
- You cannot delete or add a new set of input parameters for the default SIP2 bin configuration rule.

3. Click **Delete** from the row action for the specific set of input parameters record you want to delete.

4. Add a new set of input parameters as described in **To add a SIP2 bin configuration rule** above.

5. Under **Output Parameters**, enter a bin number – the number of the bin in which the self-check machine is to place the item.

6. Click **Save** to store your changes to the SIP2 bin configuration rule.
Configuring Physical Locations

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. 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).

![Physical Locations List Page]

**Note**

Ensure that you are within the context of the library whose physical locations you want to configure by selecting the required library from the Configuring filter on the Fulfillment Configuration 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.
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), click 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 **Location 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. Items in unavailable locations are
considered unavailable when calculating display logic rules and the display of services in Primo. Otherwise, this field has no functional significance.

- **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.

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. A call number is a group of numbers and/or letters that indicate where in the library a specific book can be found.

7. Specify the URL of a map that can assist patrons in finding the location.

8. Click **Add Location** to add the location.

**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, click **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 click **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`.

5. Click **Save** to store the changes you made to the physical location.

---

**Note**

If the external location name 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 reshelf 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. Click **Add and Close** to close the dialog box. The new remote storage facility appears at the bottom of the list of remote storage facilities on the Remote Storage List page.

**Editing Remote Storage Facility Details**

You can edit the details of any remote storage facility.

**To edit the details of a remote storage facility:**

1. On the Remote Storage List page (Configuration Menu > Fulfillment > Locations > Remote Storage), select **Edit** in the row actions list for the specific remote storage facility record whose information you want to update. The Edit Remote Storage Facility page appears.

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, click **Full Calendar** and **Add Record**, as needed, to edit the details that define when the remote storage facility is open and closed. For details, see Adding/Editing Calendar Details.

**Note**

When adding a record of type **Event**, you can define the hours that a shuttle leaves the remote storage facility to bring items to the library.

4. Click **Save** to store your changes to the remote storage facility details.
Physical Fulfillment

A loan that meets all the conditions specified in 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 a library 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 Fulfillment Unit Rules for a detailed Ask the Expert session on configuring fulfillment unit rules.

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).
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), click 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
5. Click **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 (see To add fulfillment unit locations in **Editing a Fulfillment Unit**).

- **Fulfillment Unit Rules** – The Terms of Use to apply to the fulfillment unit (see To add fulfillment unit rules in **Editing a 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 click a code or select **Edit** from the row actions list of a fulfillment unit. The Edit Fulfillment Unit page appears.
2. In the **Fulfillment Unit Details** tab, edit the general fulfillment unit details as required. For information on the fields displayed on this page, see To add a fulfillment unit in Editing a Fulfillment Unit.

3. Click 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, click **Attach Existing Location**. The Physical Locations List page appears.

5. Select the existing locations that you want to attach to the fulfillment unit and click **Select** (you can select multiple locations). The locations are added to the list of locations that are attached to the fulfillment unit.

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**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.

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6. To attach and add a new location, click **Attach New Location**. The Attach New Location dialog box appears.
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. Click **Add** to attach the location and add another location, or **Add and Close** to close the dialog box and attach the location to the fulfillment unit. The location is added to the list of locations that are attached to the fulfillment unit.

**Note**

To remove a location from the list of attached locations in the **Fulfillment Unit Locations** tab, click **Remove** for a location.

11. Click the **Fulfillment Unit Rules** tab. The **Fulfillment Unit Rules** tab page appears.

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, click **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.
- Process type - Create a rule for items undergoing specific process types.
- User group - Create a rule for users in specific user groups.

16. Click **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).

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. Click **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. Click **Save** to store your changes to the fulfillment unit rule. The new rule appears in the list of rules in the **Fulfillment Unit Rules** tab.

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.

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**Note**

Use the rule’s **Actions** menu to edit, duplicate, or delete a rule. Enable/disable the rule by toggling the slider.
20. Click **Save** to store the fulfillment unit details. The new fulfillment unit appears in the list of fulfillment units on the Fulfillment Units List page.

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**.

![Edit Fulfillment Unit](image)

**Edit Fulfillment Unit Details - Collaborative Networks Member Institution**

**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](#).

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### 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
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**).

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**), click **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>
<tbody>
<tr>
<td><strong>Booking:</strong></td>
<td></td>
</tr>
<tr>
<td>Back to Back Booking</td>
<td>The minimum amount of time required between consecutive booking requests for the same resource &amp; requester. If <strong>Value type = None</strong> 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.</td>
</tr>
<tr>
<td>Booking Release Time</td>
<td>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.</td>
</tr>
<tr>
<td>Future Limit</td>
<td>How far in advance an item can be reserved through a booking request. Values: None/Other. If you select Other, select a value and a unit of time measurement.</td>
</tr>
<tr>
<td>Fulfillment Policy Type</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------</td>
<td>-------------</td>
</tr>
</tbody>
</table>
| Is Item Bookable       | Whether booking is allowed.  
Values: True/False |
| Maximum Allowed Booking Length | The maximum permitted duration of the booking request.  
Values: None/Other. If you select Other, enter a value and a unit of time measurement. |
| Preview Period         | 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.  
Values: None/Other. If you select Other, enter a value and a unit of time measurement. |
| Loan:                  | Whether to trigger a block on the user record if a loan is overdue. 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.  
Values: None/Other. If you select Other, enter a value and a unit of time measurement. |
| Block When Overdue     | Note  
This policy takes the grace period into consideration and deducts it from the block period. For example, if the loan is overdue by 10 days, but there is a grace period of 3 days, the user will be blocked for the past 7 days. |
| Cancelled Recall Due Date | What happens to a loan’s due date when a recall placed on the loan is canceled. The values are:  
- Restore the original due date  
- Keep the same recalled due date unchanged  
- Attempt to renew the recalled loan using standard renew procedures  
For more information on recall requests, see Recall Requests. |
| Closed Library Due Date Management | How to manage fulfillment activities when the library is closed. The available values are:  
- Keep – Keep the current due date  
- Move backward – Move to the end of the previous open day  
- Move forward – Move to the beginning of the next open day  
- Move to the end of the next open day (affects due dates that would otherwise fall on a day that the library is closed)  
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>Fulfillment Policy Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Delivery Fee</td>
<td>Currently under construction</td>
</tr>
</tbody>
</table>
| Due Date               | The length of time the item may be borrowed. The values are:  
  - Fixed – Based on your institution’s calendar, the end of a term. Select a semester.  
  - Non Fixed – Based on the date the item was borrowed. Select a value and a unit of time measurement.  
  If you set the **Unit of Measurement** field to **Days**, **Month**, or **Week**, you can also specify a specific time. If you don’t specify a time, the default is your institution’s closing time.  
  The original date that the item was borrowed is not included when determining the due date. For example – an item loaned on April 1 with a loan period of 6 days is due on April 7.  
  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.  
  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. |
| 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 grace period is March 3.  
  The grace period applies to both regularly loaned items and recalled items.  
  **Note**  
  If the grace period passes and the item is not returned, the fine is applied retroactively to the due date.  
  Values: None/Other. If you select Other, select a value and a unit of time measurement. |
| Is Loanable | 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 |
<table>
<thead>
<tr>
<th>Fulfillment Policy Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preference to allow an override by Operator/Manager. The block is also applicable to loaning from a self-check machine.</td>
<td></td>
</tr>
<tr>
<td>Whether the library can recall the item if the item is on loan. If this setting is True and Recalls Loans = No on the Loan Recalls (Request Configuration) mapping table, the loan is not recalled (see Configuring Loan Recall Requests). Only if Recalls Loans = Yes is the Terms of Use policy applied.</td>
<td></td>
</tr>
<tr>
<td>Is Recallable</td>
<td>Note</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Is Renewable</td>
<td>Whether a patron can renew the loan on the item. Values: True/False</td>
</tr>
<tr>
<td>Lost Item Fine</td>
<td>The amount to pay if the item is lost. Values: None/Other. If you select Other, enter an amount to pay in the local currency.</td>
</tr>
<tr>
<td>Lost Item Replacement Fee</td>
<td>The amount to pay to replace a lost item. Note Replacement costs can be set per item. If a replacement cost exists for a specific item, it is used when the item is noted as &quot;lost&quot;. If a replacement cost does not exist for an item, Alma uses the value from the Lost Item Replacement Fee policy. Values: None/Other. If you select Other, enter an amount to pay in the local currency. When set to Other with the value 0, no fine is added to the user, even if the item has a replacement cost. When set to None, the fee is generated according to the item's replacement cost.</td>
</tr>
<tr>
<td>Lost Item Replacement Fee Refund Ratio</td>
<td>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.</td>
</tr>
<tr>
<td>Fulfillment Policy Type</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------</td>
<td>-------------</td>
</tr>
</tbody>
</table>
| **Maximum Renewal 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**). |
| **Note** | If the **Value type = None** for this policy type, there is no limit to the loan renewal period. |
| **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. |
<p>| <strong>Overdue Notification Fine Type 1</strong> | The amount the patron must pay for a “Type 1” overdue notification. See <a href="#">Configuring Overdue and Lost Loan Profiles</a>. Values: None/Other. If you select Other, enter the amount to pay in the local currency. |
| <strong>Overdue Notification Fine Type 2</strong> | The amount the patron must pay for a “Type 2” overdue notification. See <a href="#">Configuring Overdue and Lost Loan Profiles</a>. Values: None/Other. If you select Other, enter the amount to pay in the local currency. |
| <strong>Overdue Notification Fine Type 3</strong> | The amount the patron must pay for a “Type 3” overdue notification. See <a href="#">Configuring Overdue and Lost Loan Profiles</a>. Values: None/Other. If you select Other, enter the amount to pay in the local currency. |
| <strong>Overdue Notification Fine Type 4</strong> | The amount the patron must pay for a “Type 4” overdue notification. See <a href="#">Configuring Overdue and Lost Loan Profiles</a>. Values: None/Other. If you select Other, enter the amount to pay in the local currency. |
| <strong>Overdue Notification Fine Type 5</strong> | The amount the patron must pay for a “Type 5” overdue notification. See <a href="#">Configuring Overdue and Lost Loan Profiles</a>. Values: None/Other. If you select Other, enter the amount to pay in the local currency. |
| <strong>Recalled Overdue Fine</strong> | The amount that the patron must pay, per period, if a recalled item was returned late. |</p>
<table>
<thead>
<tr>
<th>Fulfillment Policy Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
<td></td>
</tr>
<tr>
<td>Recall Period</td>
<td>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. For more information on recall requests, see Recall Requests.</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>
</tbody>
</table>

**Resource Sharing:**

<table>
<thead>
<tr>
<th>Allow Resource Sharing Requesting</th>
<th>Whether a patron can place a resource sharing borrowing request. Value: True/False</th>
</tr>
</thead>
<tbody>
<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 Resource Sharing</td>
<td>Whether an 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. 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>Fulfillment Policy Type</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Yearly Resource Sharing Requests Limit</td>
<td>The maximum number of resource sharing requests that a patron is allowed to have in a given year. Deleted 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>
<tr>
<td>Request:</td>
<td></td>
</tr>
<tr>
<td>Hold Shelf Period</td>
<td>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.</td>
</tr>
<tr>
<td>On Shelf Request Policy</td>
<td>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.</td>
</tr>
<tr>
<td>Is Digitizeable</td>
<td>Whether a patron can request a digital copy of the item. Values: True/False</td>
</tr>
<tr>
<td>Is Requestable</td>
<td>Whether a patron can request to borrow the item. Values: True/False</td>
</tr>
</tbody>
</table>
| 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.                                                                                                                                                                     |
| Automatically convert to resource sharing           | Values: True/False. If this policy is set to True and the request is going to be canceled due to execution of either 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.                                                     |</p>
<table>
<thead>
<tr>
<th>Fulfillment Policy Type</th>
<th>Description</th>
</tr>
</thead>
</table>
|                         | 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. |

**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 |

| 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. |

<p>| Patron Role Renewal Period | The amount of time by which the role of Patron for this user is renewed. Values: None/Other. If you select Other, enter a value and a unit of time measurement. |</p>
<table>
<thead>
<tr>
<th>Fulfillment Policy Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<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. 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. 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. 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). Values: None/Other. If you select Other, enter a value and a unit of time measurement. For more information regarding authorization and authentication, see Expiration Date.</td>
</tr>
</tbody>
</table>

3. Click **Next**. The Policy Details page appears. This is the second page of the two-page wizard.

![Select Fulfillment Policy Type Page](image)

4. Enter a policy name (required) and policy description (optional).

**Note**

The due date policy’s description is what is shown in the Primo Get It tab’s item list. If no description is defined, the Get It tab displays the due date policy’s value and unit of measurement.

5. 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. Click **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 click 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 [Creating 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.
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).
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.

Click the Terms of Use Name, Type, or Owner headings to sort the list alphabetically — in ascending or descending order.

The following actions can be performed on this page:

- 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), click Add a Terms of Use. The Select Fulfillment Terms of Use Type page appears. This is the first page of a three-page wizard.

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. Click 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. Click Next. The third page of the wizard appears.
7. Review the details of the new terms of use. Click **Back** to make changes to the Terms of Use.

8. Click **Save** to store the details of the new set of Terms of Use. The new set of 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. Click **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**), click 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. Click the **Fulfillment Unit Rules** tab.

6. In the **Rule Type** field, select **Borrowing Resource Sharing** to display the resource sharing borrowing rules.

7. Click **Add Rule**. The Fulfillment Unit Rules Editor page appears.

8. Configure a rule, adding the Terms of Use you configured above.

9. Click **Save**. The Fulfillment Units List page displays the fulfillment unit with the updated rule.
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.

   Related Fulfillment Rules Page

   The fulfillment rules that are using the selected Terms of Use appear in the table.

2. Optionally, you can do the following:
   ◦ Click the link in the Rule Name column to open the Fulfillment Unit Rules Editor page for the selected rule.

   Fulfillment Unit Rules Editor Page
- Click the link in the **Fulfillment Unit** column to open the Edit Fulfillment Unit page for the selected fulfillment unit.

**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. Click the **Fulfillment Unit Rules** tab.
6. Click **Add Rule**
7. In the **Input Parameters** section, Click **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
- Fulfillment 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, seeBlocking and Unblocking Users. When an item is blocked it can’t be loaned to the user; seeCreating 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 Workbench Preferences page (Configuration Menu > Fulfillment > Physical Fulfillment > Block Preferences).

- 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. You set the block preferences at the institution level. 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.
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>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 cannot be loaned to patron - insufficient due date</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 if blocked.</td>
<td>• Block</td>
<td>Block</td>
</tr>
<tr>
<td>This item can only be loaned from reading room desk</td>
<td></td>
<td>• Block</td>
<td>Override by All</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>
<tr>
<td>Item does not belong to this institution</td>
<td></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 from a given circulation desk when the item is on the hold shelf of a different circulation desk for the same patron.</td>
<td>• Block</td>
<td>Override by All</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>
<tr>
<td></td>
<td></td>
<td>• Handle Automatically</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.</td>
<td>• Block</td>
<td>Override by All</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>
<tr>
<td></td>
<td></td>
<td>• Handle Automatically</td>
<td></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>Override by All</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Override by All</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   | • 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.                                                                                                                                                                                                                       | • Override by Manager  
  • Override by Operator                  |                           |                           |
| desk                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | • Block                                      |                           |
| Item cannot be returned at this circulation   | • 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.                                                                                                                             | • Override by All  
  • Override by Manager  
  • Override by Operator                  |                           |                           |
| desk                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | • Handle Automatically                       |                           |
| The loan cannot be renewed due to the loan    | 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.                                                                                                                                                                                                                                                                                                                               | • Override by All  
  • Override by Manager  
  • Override by Operator                  |                           |                           |
| status                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                           |                           |
| 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.                                                                                                                                                                                                                                                                                                                                                                                                                     | • Override by All  
  • Override by Manager  
  • Override by Operator                  |                           |                           |
| 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.                                                                                                                                                                                                                      | • Override by All                          |                           |                           |

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<table>
<thead>
<tr>
<th>Block Name</th>
<th>Description</th>
<th>Available Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patron's card has expired</td>
<td>Loaning an item is blocked for a patron with an expired user record.</td>
<td>• Override by Manager&lt;br&gt;• Override by Operator</td>
</tr>
<tr>
<td>Patron is not active</td>
<td>Loaning an item is blocked for a patron with an inactive user record.</td>
<td>• Block&lt;br&gt;• Override by All&lt;br&gt;• Override by Manager&lt;br&gt;• Override by Operator</td>
</tr>
<tr>
<td>Patron loan limit exceeded</td>
<td>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).</td>
<td>• Block&lt;br&gt;• Override by All&lt;br&gt;• Override by Manager&lt;br&gt;• Override by Operator</td>
</tr>
<tr>
<td>Patron overdue limits exceeded</td>
<td>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.</td>
<td>• Block&lt;br&gt;• Override by All&lt;br&gt;• Override by Manager&lt;br&gt;• Override by Operator</td>
</tr>
<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>• Block&lt;br&gt;• Override by All&lt;br&gt;• Override by Manager&lt;br&gt;• Override by Operator</td>
</tr>
<tr>
<td>Block Name</td>
<td>Description</td>
<td>Available Actions</td>
</tr>
<tr>
<td>------------</td>
<td>-------------</td>
<td>-------------------</td>
</tr>
</tbody>
</table>
| Not Renewable – Item has Request(s) | blocks renewal of additional copies of an item that has been recalled. | • Block  
• Override by All  
• Override by Manager  
• Override by Operator  
• Handle Automatically | |
| Item is currently on loan by another patron |  | • Block  
• Override by All  
• Override by Manager  
• Override by Operator  
• Handle Automatically | Return the item and loan to the new patron |
| A resource sharing request must be renewed by the resource sharing library |  | Block | |
| Item has not been received by resource sharing operator |  | • Block  
• Override by All  
• Override by Manager  
• Override by Operator  
• Handle Automatically | Perform automatic resource sharing receive |
| User does not have a patron role or the role has expired |  | • Block  
• Override by All  
• Override by Manager  
• Override by Operator | |

The Workbench Preferences page contains the following similar settings:
• **The loan cannot be renewed due to the loan status** – Used when an item’s status is Lost, Claimed Returned, or Recalled.

• **Not Renewable - Item has Request(s)** – When multiple copies of an item are checked out and a recall request recalls only one of the items, the other items that have not been recalled cannot be renewed.

**To edit the details of a block preference:**

1. On the Workbench Preferences page (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. Click **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.

Renewal may be prevented due to reasons such as:

- 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 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).

![Automatic Loan Renewal Rules Page](image)

**Note**

Automatic loan renewal 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:

• Add automatic loan renewal rules (see Adding Automatic Loan Renewal Rules)
• Edit automatic loan renewal rules (see Editing Automatic Loan Renewal Rules)
• 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, you can use the Duplicate option on 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, click 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.
5. Under Output Parameters, select whether auto renewal will be applied (True) or will not be applied (False).
6. Click 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.

---

Note

All the input parameters must be fulfilled for the rule to be applied. If they are not, the default rule is applied.

---

Editing Automatic Loan Renewal Rules

You can edit the default automatic loan renewal rule, or an automatic loan renewal rule that you added.

To edit an automatic loan renewal rule:

1. On the Automatic Loan Renewal Rules page (Configuration Menu > Fulfillment > Physical Fulfillment > Auto Loan Renewal Rules), select Delete from the row actions list for the specific rule you want to edit, or click the Edit link under Default Rule to edit the default automatic loan renewal rule. The Automatic Rule Loan Renewal page appears.
2. Modify the rule name and description as required.

Note

- You cannot edit an existing set of input parameters. To modify an existing set of input parameters, first delete the existing set, and then add a new set.
- You cannot delete or add a new set of input parameters for the default automatic loan renewal rule.

3. Click Delete for a set of input parameters.
4. Add a new set of input parameters as described in Adding Automatic Loan Renewal Rules.
5. Under Output Parameters, select whether auto renewal should (True) or should not (False) be applied.
6. Click Save to store your changes to the automatic loan renewal rule.

The default rule has no configuration parameters and can only be activated (True) or deactivated (False), as follows:

- **True** – Indicates that if no auto renewal rule is met, the loan is still sent for renewal.
- **False** – Indicates that if no auto renewal rule is met, the loan is not sent for renewal.

### 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 (Ful Overdue And Lost Loan Notification Letter) 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.

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.

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). To configure the Ful Overdue And Lost Loan Notification Letter, see Configuring Alma Letters.

Note

Configuring these letters may require the use of IF statements in the XSL for each of the notification types. For more information, see the Example Letter Customization: Borrowing Activity Letter.

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).

Overdue and Lost Loan Profile List Page
The following actions can be performed on this page:

- Add an Overdue and Lost Loan Profile (see Adding an Overdue and Lost Loan Profile).  
- Add an Overdue and Lost Loan Notification Profile (see Adding an Overdue and Lost Loan Notification).  
- Edit a profile (select Edit from the row actions list).  
- Duplicate a profile (select Duplicate from the row actions list and modify the relevant fields).  
- Delete a profile (select Delete from the row actions list).  
- Run a profile (select Run Now from the row actions list) to create the overdue or lost loan notifications on demand.  
- Run a status update (select Status Update from the row actions list). This process runs the profile without sending a notification and without applying fees or blocks. This is commonly used during a migration to Alma or if adding a new Overdue and Lost Loan Profile step. The affected loans will be marked to prevent them from getting the same notifications a second time when the job runs again. For example, if you create a new rule that sends a notice to loans that are 3 days overdue, the new profile will catch all loans that already 3 or more days overdue, including loans that may be 30 days overdue. To prevent that, and make sure the profile sends notices only for loans that become 3 days overdue after the profile has been created, use this option when defining the new profile.  
- Enable or disable overdue and lost loan profiles.

Learn about adding overdue and lost loan profiles and notifications in the Enhancements to the Overdue and Lost Loan Profile video (5:10 mins).

### Adding an Overdue and Lost Loan Notification

Adding an Overdue and Lost Loan Profile (see Adding an Overdue and Lost Loan Profile).  

You can add overdue and lost loan warning profiles to an institution. These profiles determine the criteria by which the 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. Click 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 letters that are 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 **Full Overdue And Lost Loan Notification Letter**, you also need to customize the letter XSL. A condition such as the following should be used in the XSL: `<xsl:if test="/notification_data/notification_type='OverdueNotificationType1'">`. 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), click **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**

- A loan's initial **Loan Status** is Loan. 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.

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, click **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, click **Create Overdue Loan Fine** to set an overdue fine.

7. For both overdue and lost notifications, click **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, click **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 number of days is calculated by calendar days.

    For example, if an item’s loan status is updated on April 1 and **Days After Status Date** = 10, the item is considered lost on April 11. (Note that a value of 0 is the same as leaving the field empty.)

    **Note**
    
    The value of this field also applies to migrated loans, according to the loan’s creation date.

12. When you are done, click **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, 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 the job displays a warning that the loan records will be modified.

Loans Overdue Notification Status Update Warning

Overdue and Lost Loan Notification Letter XSL Considerations

There are up to five notification types that may be used within the Overdue and Lost Loan Notification Letter (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:

```
<table cellspacing="0" cellpadding="5" border="0">
<tr>
<td>
<h>@@inform_you_item_below@@ </h>
<h>@@borrowed_by_you@@ @@declared_as_lost@@</h>
</td>
</tr>
</table>
```

With:

```
<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@@ </h>
<h>@@borrowed_by_you@@ @@declared_as_lost@@</h>
</td>
</tr>
</table>
</xsl:if>
</xsl:for-each>
```
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 page for loan recalls (Configuration Menu > Fulfillment > Physical Fulfillment > Loan Recalls Configuration).

![Request Configuration Mapping Table Page](image)
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. The Customize button is changed to Restore, and the Recalls Loans column is enabled for editing.

2. Select No in the Recalls Loans column to disable loan recall requests for the specified action.

3. Click Save. Loan recall requests are not sent during the specified action.

   To enable loan recall requests for an action, click Restore.

After configuring a loan recall request for a specified action, you must 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 Request Task Names**

To configure request task names, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can customize the names of request statuses in your Primo My Account using the Request Task Name Patron Display Code Table page (Configuration Menu > Fulfillment > Physical Fulfillment > Request Task Name).
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. Click 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), click **Add Rule**. The Request Pickup Configuration page appears.

![Request Pickup Configuration Page](image)

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.
   - **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. Click **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 the system applies the first (and only the first) appropriate, enabled rule.

7. Rules may be enabled or disabled in the **Enabled** column.

8. Click **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.

---

**Configuring Self-Check Machine Messages**

To configure request pickup rules, 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)*.

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, click **Customize** to save your changes.
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.

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).
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 (see Editing a Set of Patron Limits)
- Delete a set of patron limits (click Delete)

Adding a Set of Patron Limits

You can add a new set of patron limits to the institution. When you add a set of patron limits for a specific user group (for example, Alumni), ensure that there is only one enabled set of limits for this user group.

You define patron limits at the institution level. The limits that you define apply to all libraries within the institution.

To add a new set of patron limits:

1. On the Patron Limits Mapping Table page (Configuration Menu > Fulfillment > Patron Configurations > Patron Limits), click 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. Click **Add Row**. The new set of limits is displayed at the bottom of the list of defined patron limits.
4. Click **Save** to store the new set of patron limits.

### Editing a Set of Patron Limits

You can edit the details of any set of patron limits.

**To edit patron limit details:**

1. On the Patron Limits Mapping Table page (Configuration Menu > Fulfillment > Patron Configurations > Patron Limits), locate the set of limits that you want to edit.
2. Modify the specific limit, as required.
3. Click **Save** to store the modified patron limits in the system.

### Configuring Loan Limit Rules

To configure loan limit rules, you must have one of the following roles:
- General System Administrator
- Fulfillment Administrator

You can limit the number of concurrent loans that a user may have by creating a loan limit rule. The rule can be applied according to library, location, material type, and user group.

You configure loan limit rules from the Loan Limit Rule page (Configuration Menu > Fulfillment > Patron Configurations > Loan Limits).
Loan Limit Rules Page

Note
Loan limit 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:

- Add Loan Limit Rules (see Adding Loan Limit Rules)
- Edit Loan Limit Rules (see Editing a Loan Limit Rule)
- Duplicate Loan Limit Rules (select Duplicate from the row actions and modify the relevant fields)
- Delete Loan Limit Rules (select Delete from the row actions)

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:


2. Under Input Parameters, enter a name and description of the loan limit rule.

3. Under Input Parameters, specify the components of the input parameter (Name, Operator, and Value). A set of input parameters may look like this: Library=ArtLibrary.

4. Click Add Parameter. The set of input parameters is added to the list of parameters for the loan limits rule.

5. Repeat the previous two steps to add all of the required parameters for the rule.
6. Under **Output Parameters**, enter a loan limit – the maximum number of items that a patron can borrow according to the loan limit rule.

7. Click **Save** to store the new rule.

---

### Editing a Loan Limit Rule

You can edit loan limit rules.

**To edit a loan limit rule:**

1. On the Loan Limit Rules page (*Configuration Menu > Fulfillment > Patron Configurations > Loan Limits*), select **Edit** from the row actions list for the specific rule you want to edit. The Loan Limit page opens.

2. Modify the rule name and description as required.

---

**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*.
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).

User Block Description

The following actions can be performed on this page:

- Add a set of user block definitions (see Adding 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.
• Edit a set of user block definitions (modify settings on the UserBlockDefinitions Mapping Table page. You cannot change the ID that is defined for a user group definition).
• Delete a set of user block definitions (click 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, click 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.
   - Blocked action – Select the blocked action from one of the following:
### 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.

Learn about demerits in the Demerits video (25:05 mins). For a detailed Ask the Expert session on configuring demerits, see Demerits in Fulfillment.

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.

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.
DemeritPoints Mapping Table

- **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. Click **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:

<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>
</tbody>
</table>
3. After you have added all of your demerit point definitions, click Customize to save your changes to the table.

If a user reaches the demerit threshold, the system applies a Demerit block on the patron record.

Configuring the Demerit Block

The 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 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 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. Add a new row of type Loan using the overdue loan block that was created in Step 1.
3. Access the Fulfillment Terms of Use (Configuration Menu > Fulfillment > Physical Fulfillment > Terms of Use and Policies).
4. 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.
5. To create the block, select the blank line from the drop-down, and select Add Policy from the Actions menu.
6. 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 amount of days that the policy dictates. If a cumulative value is not chosen, the expiry date will be according to the policy only, without considering previous blocks.

Note
- For any of the Days units of measurement, a day is considered a period of 24 hours. To consider a loan overdue immediately on the next calendar day, without waiting for the due hour on that day, you must set the overdue_lost_loan_profile_ignore_due_hour parameter (see Configuring Other Settings) to True. (Its default is False.)
- If Days per Overdue Days - Discrete or Open Days per Overdue Days - Discrete is selected as a unit of measurement, the calculation is <Overdue/Open overdue days> * <Value>.

7. Click Save.

8. 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.

9. 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. Click the **Blocks** tab to see all active blocks on this user (including the block’s expiry date).

**View User Blocks**

The block also displays when trying to perform certain actions, such as loaning an item.

**User block pop-up**

**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, click 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).

Ex Libris, a ProQuest Company
Configuring Digital Fulfillment

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.

Click 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 (see Editing a Digitization Department)
- 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), click 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 (days)</td>
<td>The number of days after which an item is considered expired.</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. Click Next. The Contact Information page appears.

- To add a new address, click Add Address. In the Add Address dialog box, enter the required information (indicated by a red asterisk), and click Add if you want to add more addresses, or Add and Close if you do not want to add more addresses.

- To add a phone number, click Add Phone Number. In the Add Phone Number dialog box, enter the required information (indicated by a red asterisk), and click Add if you want to add more phone numbers, or Add and Close if you do not want to add more phone numbers.
To add an email address, click **Add Email Address**. In the Add Email Address dialog box, enter the required information (indicated by a red asterisk), and click **Add** if you want to add more email addresses, or **Add and Close** if you do not want to add more email addresses.

6. Click **Next**. The Operators page appears.

7. To add an operator, click **Add Operator**. The **Add Operator** dialog box appears.

Click the select from list icon to search for and add operators, and click **Add** to add more operators, or **Add and Close** if you do not want to add more operators.

8. Click **Save**. The digitization department is added to the Department List.

For details on editing an existing digitization department, see **Editing a Digitization Department**.

---

**Editing a Digitization Department**

Departments configured for an institution cannot be edited when configuring departments for a library (that is, when a library is selected in the **Configuring**: filter at the top of the Fulfillment Configuration page during department configuration).

**To edit a digitization department:**

1. On the Department List page (**Configuration Menu > Fulfillment > Digital Fulfillment > Digitization Departments**), select the digitization department using one of the following methods:
   - Click the code number of the digitization department you want to edit.
   - Scroll to the digitization department you want to edit and select **Edit** from the row actions list.

   The General Information page appears.
The General Information page has the following tabs:

- General Details
- Served Libraries
- Contact Information
- Operators

For details on the fields in the General Information page tabs, see [Adding a Digitization Department](#).

2. Modify the information on the tabs as required.
3. Click **Save**. The changes are saved on the Department List page.

---

### Configuring Digitization Profile Rules

To configure digitization profile rules, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

When requests for digitization enter Alma, Alma checks digitization profile 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 profile rules on the Digitization Workflow Rules List page ([Configuration Menu > Fulfillment > Digital Fulfillment > Digitization Profile Rules](#)).
When a rule is applied, the rules determine:

- 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:
  - By a link in an email
  - By an attachment in an email
  - By adding the digitized document to the library’s inventory (and then sending a link to the inventory by email)

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 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.

Each rule can be enabled or disabled. By default, a new rule is enabled.

---

**Note**

Digitization profile 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:

- Add a digitization profile rule (see Adding a Digitization Profile Rule)
- Edit a digitization profile rule (see Editing a Digitization Profile Rule)
- Delete a digitization profile rule (select Delete from the row actions list)

You cannot delete the default digitization profile rule.

---

**Adding a Digitization Profile Rule**

The digitization profile rules that you define apply to all libraries within the institution.

**To add a new digitization profile rule:**


![Digitization Workflow Setup Page](image-url)

Digitization Workflow Setup Page
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 there already exists an approved copyright record for the material.</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.</td>
<td>=</td>
<td>true, false</td>
</tr>
<tr>
<td>Citation Material Type</td>
<td>Evaluation</td>
<td>Check the material type.</td>
<td>=, InList, Is Empty, Is Not Empty, Not Empty, NotInList, contains</td>
<td>The current list of material types (for example, Abstract, Anthology, and so forth).</td>
</tr>
<tr>
<td>Copyright Agency Approval Permission</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>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>Copyright Previously Approved</td>
<td>Filter</td>
<td>Restrict comparison checks to previously approved copyright clearance requests for this item.</td>
<td>Required, but has no effect</td>
<td>Required, but has no effect</td>
</tr>
<tr>
<td>Copyright Record Related to Course</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>In the Same Course</td>
<td>Filter</td>
<td>Restricts comparison checks to existing requests associated with the same course as the request.</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 request's date range. If the request's 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.</td>
<td>=</td>
<td>true, false</td>
</tr>
<tr>
<td>Number of Requests</td>
<td>Comparison</td>
<td>Compare the number of previous copyright clearance requests to a value.</td>
<td>Number</td>
<td>&gt;, =, &lt;, Not Equals, &gt;, =, &lt;, Not Equals, &gt;, =, &lt;, Not Equals, &gt;, =, &lt;, Not Equals, &gt;, =, &lt;, Not Equals</td>
</tr>
<tr>
<td>Partial Digitization</td>
<td>Evaluation</td>
<td>Evaluate whether this is a partial digitization request.</td>
<td>=</td>
<td>true, false</td>
</tr>
<tr>
<td>Patron Status</td>
<td>Evaluation</td>
<td>Evaluate the requester's active status.</td>
<td>=</td>
<td>Active, Inactive</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>Publication Date</td>
<td>Evaluation</td>
<td>Evaluate the publication status of the requested item.</td>
<td>◦ Not Equals&lt;br&gt; ◦ NotInList&lt;br&gt; ◦ contains</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 Configuring Copyright Publishers).</td>
<td>◦ =&lt;br&gt; ◦ InList&lt;br&gt; ◦ Is Empty&lt;br&gt; ◦ Is Not Empty&lt;br&gt; ◦ Not Equals&lt;br&gt; ◦ NotInList&lt;br&gt; ◦ contains</td>
<td>Publisher</td>
</tr>
<tr>
<td>Request Type</td>
<td>Evaluation</td>
<td>Indicates course related digitization, patron digitization, staff digitization, borrowing resource sharing digitization request, and lending resource sharing digitization request.</td>
<td>◦ Borrowing resource sharing digitization request&lt;br&gt; ◦ Course related digitization&lt;br&gt; ◦ Lending resource sharing digitization request&lt;br&gt; ◦ Patron digitization&lt;br&gt; ◦ Staff digitization</td>
<td></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;br&gt; ◦ =&lt;br&gt; ◦ &lt;&lt;br&gt; ◦ 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>◦ &gt;&lt;br&gt; ◦ =</td>
<td>Number</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>Time Span (In Calendar Years)</td>
<td>Evaluation</td>
<td>Evaluate the publication year of the requested item.</td>
<td>◦ &lt;</td>
<td>◦ Not Equals</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>◦ &gt;</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>◦ &lt;</td>
<td></td>
</tr>
<tr>
<td>Total Copyright Number of Chapters</td>
<td>Comparison</td>
<td>Check the total number of chapters requested, including previous requests.</td>
<td>◦ &gt;</td>
<td>Number</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>◦ ==</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>◦ &lt;</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>◦ Not Equals</td>
<td></td>
</tr>
<tr>
<td>Total Copyright Work Percentage</td>
<td>Comparison</td>
<td>Check the percentage of the work requested, including previous requests.</td>
<td>◦ &gt;</td>
<td>Number between 0 and 100</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>◦ ==</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>◦ &lt;</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>◦ Not Equals</td>
<td></td>
</tr>
<tr>
<td>User Group</td>
<td>Evaluation</td>
<td>Evaluate the user group of the requester.</td>
<td>◦ =</td>
<td>A user group</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>◦ InList</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>◦ Is Empty</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>◦ Is Not Empty</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>◦ Not Equals</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>◦ NotInList</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>◦ contains</td>
<td></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. Click **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:

     - **Note**
       - The usage type and access rights policy can be changed when adding the digital file to the record, but the collection cannot.
       - When creating digital inventory, you can determine if a representation is remote.

     - Default Collection Assignment – 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 is displayed, **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.

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.

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. Click 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.

---

### Editing a Digitization Profile Rule

You can edit the default digitization profile rule or a digitization profile rule that you added.

#### To edit a digitization profile rule:

1. On the Digitization Workflow Rules List page (Configuration Menu > Fulfillment > Digital Fulfillment > Digitization Profile Rules), select Edit from the row actions list for the digitization profile rule that contains the input parameters you want to update, or click the Edit link under Default Rule to modify the default digitization profile rule. The Digitization Workflow Setup page appears (see Digitization Workflow Setup Page above).

2. Modify the rule name and description as required.

---

**Note**

- You cannot edit an existing set of input parameters; instead, you must first delete the existing set and then add a new set.
- You cannot delete or add a new set of input parameters for the default digitization profile rule.

3. In the Input Parameters section, click Delete for the specific set of input parameters record you want to delete.

4. Add a new set of input parameters, as described in step 3 through step 6 in Adding a Digitization Profile Rule.

5. Click Save to store your changes to the digitization profile 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 > Digital Fulfillment > Access Rights). Access rights can be configured at the institution level only.

Access Rights 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)
- Edit access rights (see Editing Access Rights Policies)
- 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)

### Adding an Access Rights Policy

The access rights policies that you define apply to all libraries within the institution.

**To add an access rights policy:**

2. In the Name field, enter a name for the access rights policy.
3. From the Copyrights drop-down list, select a copyright statement to associate with the access rights policy. When a patron requests to view a digital resource, the specified copyrights are displayed before the patron is able to view the requested resource. (For information on configuring copyrights, see Configuring Copyright Declarations.)
4. To have the copyrights statement appear to customers before they can view images in the Alma viewer, select **Obtrusive Copyrights**.
   For a video describing this feature see [Display Copyrights by Default](#).

5. In the **Description** field, enter a description.

6. In the **Denied Note** field, enter the note you want displayed when access is denied.

7. Click **Add Rule**. The Access Rights Rule page appears:
   1. Enter a name (required) and a description (optional) for the new rule.
   2. Under **Expressions**, specify the components of the expression (**Criterion**, **Operator**, and **Value**). An expressions may look like this: User group = Graduate student or Embargo before 31/12/2010.

The available **Criterion** input parameters are:

- **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 by the Patron Directory Services server module. Select = or Not Equals and select True or False for the value (= True is the same as Not Equals False).

- **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.

- **User ID** – Access is permitted/denied based on the specified user id. Select an operator and a matching ID or pattern.

3. Click **Add Expression**. The expression is added to the list of expressions for the access rights rule.

4. Repeat the previous two steps to add all the required expressions for the rule.
8. Click **Save**. The rule is displayed under the rules section:

![Access Rights Policy](image)

**Access Rights**

9. Repeat the steps for adding a rule to add all of the required rules to the policy.

   If you have defined more than one rule, the order of the rules is important, as the system will apply the first (and only the first) appropriate, enabled rule. If no appropriate rule is found, the system uses the default rule.

---

**Note**

All of the expressions must be fulfilled in order for the rule to be applied. If all of the expressions are not fulfilled, the default rule is applied.

---

10. Click **Save**.
11. The policy is added to the List of policies.

**Editing an Access Rights Policy**

You can edit existing access rights policies.

**To edit an access rights policy:**

1. For an existing access rights policy, select **Edit** from the row actions list, and edit the fields as desired.
2. For an access rights rule, select **Edit** from the row actions list, and edit the expressions of the rule as desired.
3. Click **Save** to save the rule.
4. Click **Save** to save the access rights policy.
Configuring Copyright Declarations

You can configure copyright statements for digital resources. These statements can be displayed to patrons before they can view a digital resource. The copyright statements 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 statement is displayed on the Primo digitization request form.</td>
</tr>
<tr>
<td>Resource Sharing Copyrights form</td>
<td>resourceSharingCopyrights.html</td>
<td>This statement 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 statement is displayed in Leganto to students attempting to access citation materials.</td>
</tr>
<tr>
<td>Copyrights 1</td>
<td>copyrights1.html</td>
<td>Depending on the configured access rights, this copyright statement is displayed when a digital resource is shown in Primo.</td>
</tr>
<tr>
<td>Copyrights 2</td>
<td>copyrights2.html</td>
<td>Depending on the configured access rights, this copyright statement is displayed when a digital resource is shown in Primo.</td>
</tr>
</tbody>
</table>

**Note**

Copyright statements do not support HTML tags.

You configure copyright declarations on the Copyright Declarations Configuration Files page (Configuration Menu > Fulfillment > Digital Fulfillment > Copyright Declarations).

**Copyright Declarations**

To configure copyrights:

1. On the Copyright Declarations Configuration Files page, click **Customize** for a copyright statement. The following, for example, appears:
2. Edit the copyright statement, if you want, and click **Customize**.

After you edit a copyright statement the following actions are available:

- **Edit** – Edit the copyright statement
- **Restore** – Restore the copyright statement to the default
- **View Default** – View the default copyright statement

---

**Note**

The example shown above is the Digitization Request Copyrights Declaration. Entering content 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 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.

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 (see Editing Electronic Document Delivery Rules)
- 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:


Note

If you want to create a copy of an existing electronic document delivery rule, select Duplicate from the row actions list. Once you have copied the rule, you can modify it as needed.

2. In the Electronic Document Delivery Rules Editor section, specify a name (required) and description (optional) for the new rule.

3. In the Input Parameters section, specify the components of the input parameter (Name, Operator, and Value). A set of input parameters may look like this: User group = Graduate student or Inventory owner = Art Library.

4. Click 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.
6. In the **Output Parameters** section, select whether electronic document delivery should (**True**) or should not (**False**) be allowed.

7. Click **Save** to store the new rule.

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.

**Editing Electronic Document Delivery Rules**

You can edit the default electronic document delivery rule or a digitization profile rule that you added.

**To edit electronic document delivery rules:**

1. On the Electronic Document Delivery Rules List page (**Configuration Menu > Fulfillment > Digital Fulfillment > Electronic Document Delivery Rules**), select **Edit** from the row actions list for the electronic document delivery rule that contains the input parameters you want to update, or click the **Edit** link under **Default Rule** to update the default electronic document delivery rule. The Electronic Document Delivery Rules Editor page appears.

2. Modify the rule name and description as required.

**Note**

- You cannot edit an existing set of input parameters. To modify an existing set of input parameters, first delete the existing set, and then add a new set.
- You cannot delete or add a new set of input parameters for the default rule.

3. Click **Delete** for the specific set of input parameters record you want to delete.

4. Add a new set of input parameters, as described in [Adding Electronic Document Delivery Rules](#).

5. In the **Output Parameters** section, select whether electronic document delivery should (**True**) or should not (**False**) be allowed.

6. Click **Save** to store your changes to the electronic document delivery rule.

   The default rule has no configuration parameters and can only be activated (**True**) or deactivated (**False**), as follows:

   - **True** – Indicates that if no electronic document delivery rule is met, the document is still sent.
   - **False** – Indicates that if no electronic document delivery rule is met, the document is not sent.

**Configuring Copyright Publishers**

You can create a list of publishers against which to compare the publishers associated with digitization requests. These comparisons can be used in digitization profile rules during automatic copyright approval (see [Adding a Digitization Profile](#)).
Rule). The list of publishers in the Copyright Publishers code table (Configuration Menu > Fulfillment > Digital Fulfillment > Copyright Publishers).

![Copyright Publishers Code Table](image)

Copyright Publishers Code Table

You can add, edit or remove publishers from the list. For information about this page, see Code Tables.

---

**Configuring Delivery Profiles Metadata**

You can configure what metadata fields are displayed when viewing digital content in the Alma Viewer 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:

![Delivery Profiles Metadata](image)

Select Metadata Type

2. Select the metadata type that you want to configure. The following appears:

4. Reorder the fields using the arrow buttons to change the order in which the fields appear in the Alma Viewer.

5. Click **Customize**.

The fields appear in the viewer according to your configuration.
Courses

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.

Ex Libris, a ProQuest Company
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.

### 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 Additional Reading List Statuses.

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).

![Purchase Workflow Rules List Page](image)

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 Profile 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:


   ![Purchase Workflow Rule Editor Page](image)

2. Enter a name (mandatory) and description for the rule.

3. To add criteria, click Add Parameter. Enter criteria for the rule and click 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 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 of the selected statuses
Note
A citation's status can only trigger a rule when the citation is created; the rule will not trigger if the citation's status is edited manually.

- Citation Type - Whether the citation's material type matches one of the selected types
- In Repository - Whether the citation's resource is already in Alma's repository
- Number of Students - Whether the number of students is higher, lower, equal to, or not equal to a certain value
- Reading List Status - Whether the reading list's status matches one of the selected statuses
- Total Copies - Whether the total copies requested is higher, lower, equal to, or not equal to a certain value
  - **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, click **Save**.

### Configuring Course Terms

To configure additional reading list statuses, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

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.
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.
To map citation attribute types to citation attributes:

1. On the Citations Attributes To Citations Attributes Types mapping table page, click 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. Click 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, click Customize.

Configuring the Default Copyright Status of Reading List Citations

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 > Course > 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 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.

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:

Click the gray or yellow checkmarks in the rows. Click Customize when you are done. The display order and default value features on this page are not enabled.

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 public or library tags for both citations and sections in Alma. Public citation and section tags appear to patrons in Leganto. Library tags can be seen only by instructors and librarians in Leganto and Alma.
- 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 (Fulfillment > Course Reserves > Reading Lists; select Work On in the reading list row).
- 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/library 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

Make any required changes. Note that the Default Value field currently has no effect. When you are done, click 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

Make any required changes. When you are done, click Save to save your changes.

Configuring Citation Material Types

You can view the secondary material types available for citations on the Reading List Citation Secondary Types code table (Configuration Menu > Fulfillment > Courses > Citation Material Type). For more information about code tables, see Code Tables.

Note

This list is not the same as the one described in Configuring Physical Item Material Type Descriptions.
You can change the display names of the types, and you can disable to enable types.

The types are:

<table>
<thead>
<tr>
<th>Abstract</th>
<th>Anthology</th>
<th>Archive</th>
<th>Article</th>
<th>Artwork</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audio Recording</td>
<td>Blog</td>
<td>Book</td>
<td>Book Chapter</td>
<td>Case</td>
</tr>
<tr>
<td>Case Study</td>
<td>Computer Program</td>
<td>Conference</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>
</tr>
<tr>
<td>Legislation</td>
<td>Letter</td>
<td>Manuscripts</td>
<td>Map</td>
<td>Music</td>
</tr>
<tr>
<td>Newspaper</td>
<td>Newspaper Article</td>
<td>Other</td>
<td>Pamphlet</td>
<td>Patent</td>
</tr>
<tr>
<td>Poem</td>
<td>Presentation</td>
<td>Reference Entry</td>
<td>Research Dataset</td>
<td>Review</td>
</tr>
<tr>
<td>Score</td>
<td>Series</td>
<td>Standards</td>
<td>Statistical Data Set</td>
<td>Technical Report</td>
</tr>
<tr>
<td>Text Resource</td>
<td>Thesis</td>
<td>Transcript</td>
<td>Video</td>
<td>Website</td>
</tr>
<tr>
<td>Working Paper</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Configuring Additional Reading List Statuses

To configure reading list statuses, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

While managing 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 configure additional reading list statuses. Note that you cannot remove Alma’s predefined statuses.
You define additional reading list statuses on the Additional Reading List Statuses code table (Configuration Menu > Fulfillment > Courses > Additional Reading List Statuses). For more information about code tables, see Code Tables.

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. You cannot edit or delete any system-defined statuses (which do not appear on this table). The default radio button has no effect on this page.
Configuring Resource Sharing

To set up a resource sharing library, see Configuring Parameters of a Resource Sharing Library.

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 To add fulfillment unit rules.

You configure temporary item creation rules on the Temporary Item Creation Rule page (Configuration Menu > Fulfillment > Library Management > Temporary Item Creation Rules).

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.)

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 Page](image)

**Note**

You can configure workflow profiles at the institution level only. Select the required institution from the Configuring filter on the Fulfillment Configuration page.

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:**

1. On the Workflow Profiles page (Configuration Menu > Fulfillment > Resource Sharing > Workflow Profiles), click **Add Workflow Profile**. The Add Workflow Profile dialog box appears.

   ![Add Workflow Profile](image)

2. Enter a name for the workflow profile.
3. From the **Type** drop-down list, select **Borrowing** or **Lending**.
4. Select the steps you want added to the profile. More than one step can be selected. These steps control the actions that can be performed on the borrowing and lending request task lists for the partner associated with the workflow.

   The available steps depend on the workflow profile type selected in step 3, and are described in the following table:

<table>
<thead>
<tr>
<th>Type</th>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Borrowing</td>
<td>Automatic renew</td>
<td>Enable automatic renewal of requests received for borrowing partners linked to the specified workflow. A request whose profile contains this step is automatically renewed as per the requested due date, and the request's status updates to <strong>Renew Request Accepted</strong>.</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><strong>Cancel request not accepted</strong></td>
<td>A cancellation request can be rejected by the partner</td>
</tr>
<tr>
<td></td>
<td><strong>Cancel requested</strong></td>
<td>A requested item can be canceled by the borrowing 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>Declared lost by partner</strong></td>
<td>An item can be declared lost by the partner</td>
</tr>
<tr>
<td></td>
<td><strong>Declared overdue by partner</strong></td>
<td>An item can be declared overdue by the partner</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><strong>Note</strong></td>
<td></td>
<td></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 Renew and Renew Reply entries in Workflow Actions.</td>
</tr>
<tr>
<td></td>
<td><strong>Mediated Patron Renewal</strong></td>
<td>Enable Mediated Patron Renewal to require operator review before renewals are transmitted to the lender.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>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></td>
<td><strong>Recalled by partner</strong></td>
<td>The request can be recalled by the partner</td>
</tr>
<tr>
<td></td>
<td><strong>Reject</strong></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.</td>
</tr>
</tbody>
</table>

**Note**

Automatic renewal is possible only for ISO partners.

Note

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.
<table>
<thead>
<tr>
<th>Type</th>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Deselecting Reject</td>
<td>Removes the reject action from the task list and the rota tab of the request. Also while deselected, the reject action 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>Report damaged item to partner</td>
<td>A damaged item can be reported to the partner</td>
</tr>
<tr>
<td></td>
<td>Report lost item to partner</td>
<td>A lost item can be reported by the partner</td>
</tr>
<tr>
<td></td>
<td>Request accepted</td>
<td>A requested item can be accepted by the partner</td>
</tr>
<tr>
<td></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></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>Lender check in</td>
<td>Sends a confirmation message to the borrower that the item has been checked in</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Note</strong></td>
</tr>
<tr>
<td></td>
<td></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>Patron renewal</td>
<td>Enable a patron to request renewal of resource sharing items.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>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></td>
<td>Renewal 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></td>
<td>Staff renewal</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. Click 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 a Copyright Statement

To configure a copyright statement, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can configure a copyright statement that is displayed to patrons before they request an item from a partner.

You configure the copyright statement on the Configuration File page (Configuration Menu > Fulfillment > Resource Sharing > Copyright).

![Copyright Statement Configuration File Page]

**Note**

A copyright statement can be configured at the institution level only. Select the required institution from the Configuring filter on the Fulfillment Configuration page.

To enter a copyright statement:

1. In the Content field, enter the copyright statement that you want to display to patrons.
2. From the Enabled drop-down list, select Yes.
3. Click Customize to store the new copyright statement in the system.

Configuring Rota Assignment Rules

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.

Rota Assignment Rules List Page

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. Click **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, click 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, click **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, click **Copy to Library**. The Rota Assignment Rules page appears.
   2. Modify the rule parameters, as required, and click **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](#).

You configure locate profiles on the Locate Profiles List page (**Configuration Menu > Fulfillment > Resource Sharing > Locate Profiles**).

### Note

Locate profiles can be configured at the institution level only. Select the required institution from the **Configuring** filter on the Fulfillment Configuration page.
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:**


   ![Locate Profile Details Page](image)

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.exilbrisgroup.com/alma/integrations/Z39.50](https://developers.exilbrisgroup.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)](https://developers.exilbrisgroup.com/alma/integrations/BLDSS).
   - **Fulfillment Network** - The fulfillment network type is used for institutions that share the same fulfillment network. For more information, see [Fulfillment Network Requests](https://developers.exilbrisgroup.com/alma/integrations/Fulfillment).

4. Click Next. The second page of the wizard that appears depends on the selected profile type.

   **Note**

   If the **No Locate** profile type was selected, no additional parameters can be configured. Click Save to save the locate profile.

5. For an **Alma** profile type, configure the 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.

If you want to know which of the network members has the resource, select the **Alma network** check box.

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 **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**
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 clicking Locate Resource on the Resource Sharing Borrowing Requests page).

Click 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.
   2. Click 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 click Go. The Search External Resource Setup page appears. Choose an entry and click Select to return to the Locate Profile Details page.
   4. In the Credentials field, enter any relevant credentials for the search.
   5. Click 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 it's 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. Click 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

Ex Libris, a ProQuest Company
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).

4. Click **Save**. The shipping cost rule appears on the Shipping Cost – Lender Rules List page.

---

**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:**

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](#)).

4. Click **Save**. The shipping cost rule appears on the Shipping Cost – Borrower Rules List page.

---

**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 mapping tables, see [Mapping Tables](#).

---

**Sending Borrowing Request Rules List Page**

Sending borrowing request rules that have been distributed from a network are indicated by a check mark in the **Network Rules List** section of the page.

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 (see [Editing the Default Sending Borrowing Request 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:**


![Sending Borrowing Request Rules Page](#)

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. Click **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.

### Editing the Default Sending Borrowing Request Rule

When you edit the default sending borrowing request rule, you can edit the name and description of the rule, and the system behavior when none of the configured sending borrowing rules take effect.

**To edit the default sending borrowing request rule:**


2. In the **Sending Borrowing Request Rules** section, modify the default rule name and description, as required.

3. In the **Send Request** field, modify the value, as required.
   - **True** – If none of the configured rules take effect, the borrowing request is sent automatically.
   - **False** – If none of the configured rules take effect, the borrowing request is not sent.

4. Click **Save**.

### Configuring Patron Queries

A letter is sent to the patron when a user clicks 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**.
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 page (Configuration Menu > Fulfillment > Resource Sharing > Patron Query Templates). 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).

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. Click 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. Click Add Row. The template appears in the list of templates.

8. Click Customize.

The fields are assembled into a letter that is sent when a user clicks 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 page (Configuration Menu > Fulfillment > Resource Sharing > Patron Query Types).

---

**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.

   ![Patron Query Types Code Table Page]

   **Patron Query Types Code Table Page**

   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)

2. You can modify the enabled entries’ descriptions. Note that the Description column’s text appears in the drop-down of query types (after clicking 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.

   ![Patron Query Types Code Table Page]

   **Patron Query Types Code Table Page**

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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. Click 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).

![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).

Requested Media Definition Page

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. Click 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 **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 **Print Slip** letter, sent when clicking 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 clicking 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, click **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](#)). You can enable or disable the levels, and you can change the descriptions.
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).

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 page (Configuration Menu > Fulfillment > Resource Sharing > Library Mapping). 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 Audit tab. Access the Brief Audit Fields page (Configuration Menu > Fulfillment > Resource Sharing > Brief Audit Fields). Each field may be enabled or disabled. Click Customize when the editing is done. 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). You can enable or disable a language, reorder the languages, or edit the name of the language. Click Customize when you are done.
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 page (Configuration Menu > Fulfillment > Resource Sharing > Item Policy Exceptions). 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.

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 page (Configuration Menu > Fulfillment > Resource Sharing > Request Form Type by Genre).
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 clicking on the Enabled checkmark.

Configuring Resource Sharing Copyright Statuses

To configure the copyright statuses, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Descriptions for the resource sharing copyright statuses may be configured. Access the Resource Sharing Copyright Statuses page (Configuration Menu > Fulfillment > Resource Sharing > Copyright Status). This link appears on the Resource Sharing menu only if the parameter rs_borrower_copyright_management is set to true (see Configuring Other Settings).

Click Customize to modify a record. Modify the description as desired and click the Customize button in the bottom right corner of the page to save modified records.
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 page (Configuration Menu > Fulfillment > Resource Sharing > Borrowing Requests 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.
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.
- 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).

For more information about requests, see Requests in Alma. You configure display logic rules on the Discovery Interface Display Logic page (Configuration Menu > Fulfillment > Discovery Interface Display Logic > Display Logic Rules).

Discovery Interface Display Logic Page
The following actions can be performed on this page:

- Add a display logic rule (see Adding Display Logic Rules)
- Enable or disable a display logic rule
- 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 [Discovery Interface Display Logic](#) for a detailed Ask the Expert session on configuring discovery interface display logic.

For examples of working with discovery display logic, see [Primo and Alma - Discovery Interface Display Logic Rules](#).

---

## 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** list, select the group whose users 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 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 a specific package, interface, or service name for which this service will not appear.

---

Note

- Display logic rules can be configured at the institution level only. Select the required institution from the Configuring filter on the Fulfillment Configuration page.

- All relevant and applicable rules are applied. If a subsequent (lower) rule conflicts with a previous (higher) rule, Alma applies the first rule.

---

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<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 Collection</td>
<td>Select an electronic collection name.</td>
</tr>
<tr>
<td>Full Text, Selected Full Text</td>
<td>Interface</td>
<td>Select an interface or an electronic collection name.</td>
</tr>
<tr>
<td></td>
<td>Electronic Collection</td>
<td>Both Community Zone and local interfaces are available.</td>
</tr>
<tr>
<td>General Electronic Service</td>
<td>Service</td>
<td>Select a general electronic service.</td>
</tr>
<tr>
<td>Resource Sharing Request</td>
<td>Availability by the campus</td>
<td>Select true to hide the service if the resource is available on campus. Otherwise, select false.</td>
</tr>
<tr>
<td>Availability by the institution</td>
<td>Select true to hide the service if the resource is available at 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 is owned 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 is owned by the institution. Otherwise, select false.</td>
<td></td>
</tr>
<tr>
<td>Resource Sharing System</td>
<td>Select a resource sharing system.</td>
<td></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>Hide Service</td>
<td>with</td>
<td>with value</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>---------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Availability by the institution</td>
<td></td>
<td>Select true to hide the service if the resource cannot be requested for availability on the institution. Otherwise, select false.</td>
</tr>
<tr>
<td>Ownership by the campus</td>
<td></td>
<td>Select true to hide the service if the resource cannot be requested for ownership by the campus. Otherwise, select false.</td>
</tr>
<tr>
<td>Ownership by the institution</td>
<td></td>
<td>Select true to hide the service if the resource cannot be requested for ownership by the institution. Otherwise, select false.</td>
</tr>
<tr>
<td>Access Rights</td>
<td></td>
<td>Select deny to hide the service if the user does not meet the access rights criteria. Otherwise, select allow.</td>
</tr>
</tbody>
</table>

#### Public Note

- /Restricted Access/ - Matches a public note containing the phrase Restricted Access, case sensitive.
- /Restricted Access/i - Matches a public note containing the phrase Restricted Access, case insensitive.
- /^(!Open Access$)/ - Matches a public note that does not equal Open Access, case sensitive.
- /^(!Open Access).*$i/ - Matches a public note that does not contain the phrase Open Access, case insensitive.

#### Usage Type

Select master to hide the service for representations with the usage type of master and select derivative to hide the service for representations with the usage type of derivative.

#### Representation Type

Select remote to hide the service for remote representations and select non-remote to hide the service for remote representations.

4. To hide the service if another service exists, in the If exists service drop-down list, select the other service.

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. Click 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 Academic Search Premier if the service page will include/display any full text from EBSCOhost.

Note

EBSCOhost is identified as the interface in this example.

![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 suit your requirements.
To edit a label:

1. On the Discovery Interface Labels code table (Configuration Menu > Fulfillment > Discovery Interface Display Logic > Labels), click Customize to the right of the label that you want to edit and modify the text in the Description field. For detailed information on the most commonly customized labels, see List of Commonly Used Labels below.

   In addition to text, you can add HTML code to the fields to change the display of labels. For example, if you modify the following fields as indicated, the output appears as displayed in the figure below.

   ◦ c.uresolver.request.title = <font color=red>ALL FIELDS REQUIRED!</font>
   ◦ c.uresolver.request.part_to_digitize = Enter pages to scan. Include article citation if applicable.<font color=red><b>*</b></font>
2. Click **Customize** at the bottom of the page to store the modified labels in the system.

### 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.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 after a request has been submitted.</td>
</tr>
<tr>
<td>c.uresolver.request.placeInQueue</td>
<td>. Place in queue is (0)</td>
<td>This label displays after a request has been submitted.</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.submitFailed</td>
<td>Failed to place a request on the resource. Please contact the library.</td>
<td>This label is displayed when a request submission fails.</td>
</tr>
<tr>
<td>c.uresolver.request.title</td>
<td>Details of title you requested:</td>
<td>This label displays on the top of a digitization or hold request form.</td>
</tr>
<tr>
<td>c.uresolver.request.notNeededAfter</td>
<td>Not Needed After:</td>
<td>This label is on the Hold Request form.</td>
</tr>
<tr>
<td>c.uresolver.request.Partial.madatoty_comment</td>
<td>Please add the part to digitize</td>
<td>Partial digitization confirmation message</td>
</tr>
<tr>
<td>c.uresolver.request.institution_dropdown_my_institution</td>
<td>My Institution</td>
<td>In fulfillment network configuration, the pickup location selection in the request form displays a My Institution option.</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 is on the 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.manualDescription</td>
<td>Manual Description:</td>
<td>The Manual Description is on the Request a different issue form. The Request a different issue 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.</td>
</tr>
<tr>
<td>c.uresolver.request.submitRequest</td>
<td>Request</td>
<td>On the hold request form, there is a Request button at the bottom of the request.</td>
</tr>
<tr>
<td>c.uresolver.request.refresh</td>
<td>Refresh Services List</td>
<td>After submitting a request, there is a link to a refresh services list.</td>
</tr>
<tr>
<td>c.search.htmlCreator.copy</td>
<td>copy</td>
<td>The count of total copies and copies available (X copy, Y available) in items 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.search.htmlCreator.copies</td>
<td>copies</td>
<td>Availability display</td>
</tr>
<tr>
<td>c.uresolver.ServicesForThisTitle</td>
<td>Services For This Title</td>
<td>This label will appear in Primo View It when there are General Electronic services available.</td>
</tr>
<tr>
<td>c.uresolver.GeneralElectronicServices</td>
<td>Additional services</td>
<td>This label will appear in Primo 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 will appear in Primo View It when there are related records displayed in Primo View It.</td>
</tr>
<tr>
<td>c.uresolver.availableOnline.full_text_prefix</td>
<td>Full text available at:</td>
<td>The label will appear in Primo View It when there is full text.</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 Primo View It.</td>
</tr>
<tr>
<td>c.uresolver.emptyList</td>
<td>No full text available</td>
<td>This text will appear in Primo View It when there is no electronic service.</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.error</td>
<td>We're sorry. An error occurred while retrieving services for this title.</td>
<td>This text will appear in Primo Get It and View It if there was a processing error.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>This text is found on the header of the request accessed from the Resource Sharing Request tab.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Book is a Citation Type</strong> on the Resource Sharing Request tab.</td>
</tr>
<tr>
<td>c.uresolver.request.ill</td>
<td>Resource Sharing Request:</td>
<td><strong>Book</strong> is a Citation Type on the Resource Sharing Request tab.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Article</strong> is a Citation Type on the Resource Sharing Request tab.</td>
</tr>
<tr>
<td>c.uresolver.request.ill.citationType.book</td>
<td>Book</td>
<td><strong>Book</strong> is a Citation Type on the Resource Sharing Request tab.</td>
</tr>
<tr>
<td>c.uresolver.request.ill.citationType.article</td>
<td>Article</td>
<td><strong>Article</strong> is a Citation Type on the Resource Sharing Request tab.</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.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 is found on the Resource Sharing Request link &gt; Volume label (both for Article and Book citation types).</td>
</tr>
<tr>
<td>c.uresolver.request.ill.issue</td>
<td>Issue</td>
<td>This label is found on the Resource Sharing Request tab &gt; Citation type: Article &gt; Issue.</td>
</tr>
<tr>
<td>c.uresolver.availableOnline.service_is_temporary_unavailable_due_to</td>
<td>Service temporarily</td>
<td>This will appear in Primo View It when the service is unavailable and there is a 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.availableOnline.service_is_temporary_unavailable</td>
<td></td>
<td>This will appear in Primo View It when the service is unavailable and there is no reason (see configuration in screenshot)</td>
</tr>
<tr>
<td>c.uresolver.getit2.request.request_options</td>
<td>Request Options:</td>
<td>The Request Options label appears in the list of services in Primo Get It.</td>
</tr>
<tr>
<td>c.uresolver.getit2.request.monograph</td>
<td>Request</td>
<td>The Request link is in Primo Get It. When all items are monographs, the link will be on the title level.</td>
</tr>
<tr>
<td>c.uresolver.getit2.request.serial</td>
<td>Request</td>
<td>The Request is in Primo Get It. When there are serial items, the link will be on item level.</td>
</tr>
</tbody>
</table>

---

Ex Libris, a ProQuest Company
<table>
<thead>
<tr>
<th>Label Code</th>
<th>Default Value</th>
<th>Location in Interface</th>
</tr>
</thead>
<tbody>
<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. Click the link to create a request.</td>
</tr>
<tr>
<td>c.uresolver.getit2.holding_list.location_map</td>
<td>Location Map</td>
<td>This is the column title for the location map links in the holding list.</td>
</tr>
<tr>
<td>c.uresolver.getit2.ill_request.monograph</td>
<td>Resource sharing request</td>
<td>The <strong>Resource Sharing Request</strong> 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 serial <strong>Resource Sharing Request</strong> 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 <strong>Digitization Request</strong> 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>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.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.item_list.type</td>
<td>Type</td>
<td>The <strong>Type</strong> column is in the holding item in Primo Get It.</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.policy</td>
<td>Policy</td>
<td>The <strong>Policy</strong> column is in the item list in Primo Get It.</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.status</td>
<td>Status</td>
<td>The <strong>Status</strong> column is in the holding item in Primo Get It.</td>
</tr>
<tr>
<td>c.uresolver.getit2.item_list.empty</td>
<td>No items exist. Please refer to the request options above</td>
<td>The label is in the items list when there is a holding without items.</td>
</tr>
<tr>
<td>c.uresolver.getit2.request_different</td>
<td>Request a different issue</td>
<td>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.</td>
</tr>
<tr>
<td>c.uresolver.getit2.digitize_different</td>
<td>Digitize a different issue</td>
<td>The <strong>Digitize a different issue</strong> column is in the holding item in Primo Get It.</td>
</tr>
<tr>
<td>dlf.block.expiry</td>
<td></td>
<td>Configure with {0} to display the user's block expiry on the <strong>My Account</strong> page. For example, entering <strong>Expired on</strong> {0} in the label description will be displayed as <strong>Expired on 07/07/2017</strong>.</td>
</tr>
<tr>
<td>dlf.onHoldShelf.until</td>
<td>until (0)</td>
<td>This label appears in the <strong>List of Requests</strong> in <strong>My Account</strong>. The first part of the status is based on the status and therefore may not be configured. Only the text of until (0) is configurable.</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><code>c.uresolver.request.part_to_digitize</code></td>
<td>Part to Digitize:</td>
<td>The label is in the digitization request in Primo Get It.</td>
</tr>
<tr>
<td><code>c.uresolver.getit2.holding_list.empty.top</code></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><code>c.uresolver.getit2.holding_list.empty.signed_in_user</code></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><code>c.uresolver.getit2.holding_list.empty.signed_in_user.no_services</code></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><code>c.uresolver.getit2.holding_list.empty.bottom</code></td>
<td>Having problems? Please contact the ExLibris 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>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.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>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.NOPROCESS.with_no_expected_date</td>
<td>On Shelf</td>
<td>This is a status in the item list.</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.relatedTemplate (@RelationType)</td>
<td>@TITLE</td>
<td>This is shown in Primo 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 and Alma-Summon environments, refer to the following section:

[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. The MARC linking entries (MARC fields 76X-78X) are used to link bibliographic records and to differentiate their relationships to users. 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, Primo View It displays the available services for the discovered record and the host record:

```
Source: Civil engineering systems [0283-0257]
Full text available at: Taylor & Francis CRKN Science and Technology

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 Primo 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 Primo 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 Primo View It.
Modifying the Display Labels for Related Electronic Services

The DISCOVERY_INTERFACE_LABELS code table page enables you to modify the following labels in Primo View It:

- **Title** – The following code defines the label that displays above the list of related records in Primo View It:

  ```
  c.uresolver.ServicesForRelatedTitles
  ```

- **Relationship** – The label that appears for each related entry in Primo View It and Get It. To modify a label, see the relevant relationship in the table below.

---

### Note

To configure close relations to appear in the same section as the related titles in Primo View It, see the **Display closely related record services** option in **Enabling the Display of Related Records in Primo**.

---

The labels and information that appear in the Primo Details section is determined by the normalization rules that are defined in Primo.
<table>
<thead>
<tr>
<th>Relation/Type</th>
<th>MARC Field</th>
<th>Location in Primo</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main series entry (remote)</td>
<td>760</td>
<td>View It: c.uresolver.viewit.related_type_list.MAIN_SERIES = Main Series</td>
</tr>
<tr>
<td></td>
<td>Indicators</td>
<td>$w, $x</td>
</tr>
<tr>
<td>Subseries entry (remote)</td>
<td>762</td>
<td>View It: c.uresolver.viewit.related_type_list.SUBSERIES = Subseries</td>
</tr>
<tr>
<td></td>
<td>Indicators</td>
<td>$w, $x</td>
</tr>
<tr>
<td>Original language entry (remote)</td>
<td>765</td>
<td>View It: c.uresolver.viewit.related_type_list.ORIGINAL_LANGUAGE = Original Language</td>
</tr>
<tr>
<td></td>
<td>Indicators</td>
<td>$w, $x, $z</td>
</tr>
<tr>
<td>Translation entry (remote)</td>
<td>767</td>
<td>View It: c.uresolver.viewit.related_type_list.TRANSLATION = Translation</td>
</tr>
<tr>
<td></td>
<td>Indicators</td>
<td>$w, $x</td>
</tr>
<tr>
<td>Supplement entry (remote)</td>
<td>770</td>
<td>View It: c.uresolver.viewit.related_type_list.SUPPLEMENT = Supplement</td>
</tr>
<tr>
<td></td>
<td>Indicators</td>
<td>$w, $x, $z</td>
</tr>
<tr>
<td>Supplement parent entry (remote)</td>
<td>772</td>
<td>View It: c.uresolver.viewit.related_type_list.SUPPLEMENT_PARENT = Supplement Parent</td>
</tr>
<tr>
<td></td>
<td>Indicators</td>
<td>$w, $x, $z</td>
</tr>
<tr>
<td>Host item entry (close)</td>
<td>773</td>
<td>View It: c.uresolver.viewit.related_type_list.PART_OF = Part Of</td>
</tr>
<tr>
<td></td>
<td>Indicators</td>
<td>$w, $x</td>
</tr>
<tr>
<td></td>
<td>Get It: c.uresolver.getit.related_title_display = Inventory of related &quot;&quot;{0}&quot;&quot; is listed below</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Details: Display/Is Part Of (defined in Primo normalization rules)</td>
<td></td>
</tr>
<tr>
<td>Constituent unit entry (close)</td>
<td>774</td>
<td>View It: c.uresolver.viewit.related_type_list.CONTAINS = Contains</td>
</tr>
<tr>
<td></td>
<td>Indicators</td>
<td>$w</td>
</tr>
<tr>
<td>Relation/Type</td>
<td>MARC Field</td>
<td>Location in Primo</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Other edition entry (remote)</td>
<td>775</td>
<td>$w, $x, $z View It: c.uresolver.viewit.related_type_list.OTHER_EDITION = Other Edition</td>
</tr>
<tr>
<td>Additional physical form entry (remote)</td>
<td>776</td>
<td>$w, $x, $z View It: c.uresolver.viewit.related_type_list.ADDITIONAL_FORM = Additional form</td>
</tr>
<tr>
<td>Issued with entry (remote)</td>
<td>777</td>
<td>$x, $w View It: c.uresolver.viewit.related_type_list.ISSUED_WITH = Issued With</td>
</tr>
</tbody>
</table>
| Preceding entry (remote)                  | 780        | 00 $w, $x, $z 01 $w, $x, $z 02 $w, $x, $z 03 $w, $x, $z 04 $w, $x, $z  
View It: c.uresolver.viewit.related_type_list.PRECEDES = Precedes  
Details: Display/Relation – Related Titles: Earlier Title (defined in Primo normalization rules) |
<table>
<thead>
<tr>
<th>Relation/Type</th>
<th>MARC Field</th>
<th>Location in Primo</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>780 Indicators 05 $w, $x, $z 780 Indicators 06 $w, $x, $z 780 Indicators 07 $w, $x, $z</td>
<td></td>
</tr>
<tr>
<td>Succeeding entry (remote)</td>
<td>785 Indicators 00 $w, $x, $z 785 Indicators 01 $w, $x, $z 785 Indicators 02 $w, $x, $z 785 Indicators 03 $w, $x, $z 785 Indicators 04 $w, $x, $z 785 Indicators 05 $w, $x, $z</td>
<td>View It: c.uresolver.viewit.related_type_list.SUCCEEDS = Succeeds Details: Display/Relation – Related Titles : Later Title (defined in Primo normalization rules)</td>
</tr>
<tr>
<td>Relation/Type</td>
<td>MARC Field</td>
<td>Location in Primo</td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>Data source entry</td>
<td>786</td>
<td>View It: c.uresolver.viewit.related_type_list.CONTAINS = Contains</td>
</tr>
<tr>
<td></td>
<td>$w, $x, $z</td>
<td></td>
</tr>
<tr>
<td>Other relationship entry (remote)</td>
<td>787</td>
<td>View It: c.uresolver.viewit.related_type_list.OTHER_RELATIONSHIP = Other Relationship</td>
</tr>
<tr>
<td></td>
<td>0#</td>
<td></td>
</tr>
<tr>
<td></td>
<td>$w, $x, $z</td>
<td></td>
</tr>
<tr>
<td>Series added entry-personal name</td>
<td>800</td>
<td>View It: c.uresolver.viewit.related_type_list.CONTAINS = Contains</td>
</tr>
<tr>
<td></td>
<td>$w, $x</td>
<td>Details: Display/Relation – Series: (defined in Primo normalization rules)</td>
</tr>
<tr>
<td>Series added entry-corporate name</td>
<td>810</td>
<td>View It: c.uresolver.viewit.related_type_list.CONTAINS = Contains</td>
</tr>
<tr>
<td></td>
<td>$w, $x</td>
<td>Details: Display/Relation – Series: (defined in Primo normalization rules)</td>
</tr>
<tr>
<td>Series added entry-meeting name</td>
<td>811</td>
<td>View It: c.uresolver.viewit.related_type_list.CONTAINS = Contains</td>
</tr>
<tr>
<td></td>
<td>$w, $x</td>
<td>Details: Display/Relation – Series: (defined in Primo normalization rules)</td>
</tr>
<tr>
<td>Series added entry-uniform title</td>
<td>830</td>
<td>View It: c.uresolver.viewit.related_type_list.CONTAINS = Contains</td>
</tr>
<tr>
<td></td>
<td>$w, $x</td>
<td>Details: Display/Relation – Series: (defined in Primo normalization rules)</td>
</tr>
<tr>
<td>Relation/Type</td>
<td>MARC Field</td>
<td>Location in Primo</td>
</tr>
<tr>
<td>--------------</td>
<td>------------</td>
<td>-------------------</td>
</tr>
</tbody>
</table>
| Valid ISBN, ISSN, or other standard number (remote) | 020 $a, $e  
022 $a, $e  
024 $a | View It: c.uresolver.viewit.related_type_list.REPLACED_BY = Replaced By |
| Cancelled/invalid ISBN, ISSN, or other standard number (remote) | 020 $z  
022 $y, $z  
024 $z | View It: c.uresolver.viewit.related_type_list.REPLACES = Replaces |
| Linking ISSN (remote) | 022 $l | View It: c.uresolver.viewit.related_type_list.LINKS_TO = Links To |

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 for related titles that appear in the Primo.

**To enable related record services:**

1. Configure the electronic services for related titles in Primo on the Related Records code table ([Configuration Menu > Fulfillment > Discovery Interface Display Logic > Related Records](#)).

   The Related Record Services Configuration page appears.
2. For **Enabled related record services**, select **Yes** to enabled the features and make other selections needed.

### Related Record Services Options

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<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>Display closely related record services</td>
<td>How closely-related services (which are defined with MARC 773 or 774 fields in the bibliographic record) should appear:</td>
</tr>
<tr>
<td></td>
<td>◦ <strong>As part of the original services</strong> – Closely-related services are placed in the list of regular services in Primo View It with no indication that these services are for related titles.</td>
</tr>
<tr>
<td></td>
<td>◦ <strong>Separately from the original record services</strong> – Closely-related services are placed under the Services for Related Titles section in Primo View It.</td>
</tr>
</tbody>
</table>

3. Click **Save**.
Configuring Direct Linking

To configure direct linking, you must have one of the following roles:

- Fulfillment Administrator
- General System Administrator

Direct linking enables users to view an electronic service (such as full text) immediately in Primo View It instead of having to click the service’s link. If the OpenURL context object contains multiple electronic services, the OpenURL link resolver displays the first electronic service in the list (if the multiple services option is 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.

**Note**

If a search is performed with a non-Primo discovery system and direct linking is enabled, Alma’s link resolver displays the electronic service directly, bypassing Primo’s services page.

You can only configure direct linking at the institution level. Select the required institution from the Configuring filter on the Fulfillment Configuration page.

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.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable direct linking when multiple services</td>
<td>Enable direct linking even when more than one electronic service is available for the record.</td>
</tr>
<tr>
<td>are available</td>
<td></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>
<tr>
<td>◦ Authentication note</td>
<td>Authentication note</td>
</tr>
<tr>
<td>◦ Public Note</td>
<td>Public note</td>
</tr>
<tr>
<td>Disable direct linking for electronic</td>
<td>Disable direct linking for electronic collections.</td>
</tr>
<tr>
<td>collections</td>
<td></td>
</tr>
</tbody>
</table>

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](image)

**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.epages, rft.pages)
  - Doi (rft_id source1="(info:doi/.*)(doi:.*))
  - Pmid (rft_id source1="(info:pmid/.*)(pmid:.*))
### 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 and Alma-Summon environments, refer to the following section:

[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.

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 Primo 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

To configure general electronic services:

1. Open the General Electronic Services Configuration page (Configuration Menu > Fulfillment > Discovery Interface Display Logic > General Electronic Services).

2. Click Add Service. The Add Service dialog box opens.
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 Primo View It and/or Get It.
- **Public Note** – The note or description of the service that displays below the link in Primo View It and/or Get It.
- **Is this a Document Delivery/ILL Service** – This option is applicable to Primo VE and Alma-Summon environments only. 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. For Primo the following options are valid: **None**, **Getit**, **Viewit**, or **Getit & viewit**. For Primo VE and Alma-Summon environments, the following options are valid: **None**, **Getit & How To Getit**, **Viewit & How To Getit**, **Getit, viewit & How To Getit**, and **How To Getit only**.
- **The URL Template** – The URL where the patron is redirected when the external service link is clicked.

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}&rft.pub={rft.pub}&rft.publisher={rft.publisher}&rft.place={rft.place}&rft.doi={rft.doi}&rfe_dat={rfe_dat}&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={rfe_dat}&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%3Adissertation
```
For more information regarding OpenURL, refer to the following:

- Commonly Used OpenURL Attributes for the URL Template
- Specific vendor web sites for OpenURL details

4. Click **Add and Close**. The new service appears on the General Electronic Service page with the following row actions: **Remove** and **Edit**.

5. Edit the new row to configure additional service details.

The Service Details page appears.

Service Details Page (Service Details Tab)

6. To display this service to signed-in users only, select **No** in the **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 **Disable Service**:

---

**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.

8. Click 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.

![Service Availability Rules Tab](image)

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](http://www.niso.org/apps/group_public/project/details.php?project_id=82).

---

1. To add a new rule, click **Add Rule**. The Edit Rule page opens.

![Edit Rule Page](image)
2. In the **Edit Rule** section, enter the rule name (required) and description (optional).

3. In the Input Parameters section, click **Add Parameter**. The Add Parameter dialog box opens.

![Edit Rule Page](image)

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](URL) or the [OpenURL Standard](OpenURL) (versions 0.1 and 1.0; see also the list of [Metadata Formats](Metadata)).
   - **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. Click **Add Parameter**. The parameter is added to the input parameter list.

6. In the **Output Parameters** section, set **IsDisplay** to **true**.

7. Click **Save**. The Service Availability Rules page displays the new rule.

10. Click **Save**. The General Electronic Services page displays the new service.

---

**Note**

- 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.

---

New for December! 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`. 
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.</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 Mapping</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>rft.advisor</td>
<td></td>
<td>Advisor, for a dissertation</td>
</tr>
<tr>
<td>rft.applcc</td>
<td></td>
<td>Application country code in ISO two-character format, for a patent. The country in which the patent application was main.</td>
</tr>
<tr>
<td>rft.appldate</td>
<td></td>
<td>Date of application, for a patent</td>
</tr>
<tr>
<td>rft.applyear</td>
<td>Year of application, for a patent</td>
<td></td>
</tr>
<tr>
<td>------------------</td>
<td>----------------------------------</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.aucorp</td>
<td>Organization or corporation that created document: &quot;Mellon Foundation&quot;</td>
<td></td>
</tr>
<tr>
<td>rft.aufirst</td>
<td>First author's given name: &quot;Fred James&quot; May have spaces and punctuation.</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.aulast</td>
<td>First author's last name: &quot;Smith&quot; May have spaces and punctuation.</td>
<td></td>
</tr>
<tr>
<td>rft.ausuffix</td>
<td>First author's name suffix: &quot;Jr.&quot; etc.</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</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.cc</td>
<td>Publication country code, in ISO two-character format: &quot;US&quot;. See cc.</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>Tag</td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>--------------</td>
<td>-----------------------------------------------------------------------------</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 ISBNs, separated by commas. May contain a hyphen. May or may not be distinct from rft.isbn.</td>
<td></td>
</tr>
<tr>
<td>rft.eissn</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>
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<td>• <strong>bookitem</strong>: section of a book, usually with a title or number</td>
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<td>• <strong>conference</strong>: record of a conference (one or more conference papers)</td>
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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 viewers available in Alma.

There are two viewers available in Alma out-of-the-box: 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.

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, click Add Service.
To configure the service availability rules for a viewer:

1. Select **Edit** for a viewer and click the **Service Availability Rules** tab.

2. Click **Add Rule**. The following appears:

Add Digital Viewer
3. Enter a name and description.

4. In the Input Parameters section, click Add Parameter. The following appears:

5. Select a name, operator, and value, and click 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. Click Save.

The rule is added to the list of service availability rules.

---

### 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 Primo View It. You can also assign services to appear in the first or last group in the list, and then be alphabetized in the three groups (first, unspecified, and last). The top service defined can be used by Primo’s direct linking option, from the search result record.

![Online Services Order Page](image)

**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, click Add To Top to configure the order of services at the top of the list. The Add To Top dialog box opens.
To configure the order of services at the bottom of the list, click **Add to Last Services**. The Add to Last Services dialog box opens, displaying the same fields as the Add to Top dialog box.

2. In the **Service type** field, select the service type. Select from:
   - DB Service
   - Full Text
   - Selected Full Text

3. In the **Service name** field, select the name for the selected service type. The **Service value** field appears.

4. In the **Service value** field, browse and select a service value. Click **Add** to add the service and enable adding another service, or click **Add and Close** to add the service and close the dialog box. The services appear on the Online Services Order page.

   You can specify the exact sequence of services by clicking the arrows in the **Move Up** and **Move Down** columns.

5. In the **Display CZ collections first** field, select one of the following options:
   - **Yes** – The online resources 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](#).

6. 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.
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 configure 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.

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), click Add Service to configure the order of services at the top of the list of results. The Add Service dialog box opens.
2. In the **Service type** field, select **General Electronic Service**.

3. In the **Service name** field, select the name for the service type. The **Service value** field appears.

4. In the **Service value** field, select a service value. Click **Add** to add the service and enable adding another service, or click **Add and Close** to add the service and close the dialog box. The services appear on the General Electronic Services Order page.

   You can specify the exact sequence of services to appear by clicking the arrows in the **Move Up** and **Move Down** columns.

---

### 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

---

Add To Top Dialog Box
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).

To configure a locations ordering profile:

1. On the Locations Ordering Profile page (Configuration Menu > Fulfillment > Discovery Interface Display Logic > Locations Ordering Profile), select Yes in the Use “IP best location” sorting field 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. The default value is No.

   IP addresses can be configured:
   ◦ On the library level (see Managing IP Definitions for a Library)
   ◦ On the campus level (see Editing a Campus)

2. 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.

3. Click 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.
Displaying License Information

Alma allows you to display an electronic resource's license information in Primo View It. The displayed terms of the license can be configured in Alma, as well as the license-related labels that display in Primo 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, refer to the following section:

Displaying License Information

Show License Link in Primo View It (Classic Primo UI)

After the user clicks the Show license link, the name of the link changes to Hide license, and the license information appears as configured in Alma:
License Terms Displayed in Primo View It (Classic Primo UI)

For more information, view the Display License Information in Primo View It video (5:02 mins).

To configure the display of license-related information, the following roles are necessary:

- Acquisitions Administrator
- Fulfillment Administrator
- General System Administrator

To display license information in Primo View It:

1. Specify which license terms to display in Primo 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. Click Save.

For more information on configuring the license terms in Alma, see Managing License Terms.

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.

Configure Maximum Number of Representations in Primo

The Max. Number of Representations in View It parameter allows you to define the maximum number of digital representations that appears in Primo View It. If there are more representations to display than the number configured here, a More... link appears. The patron can click More... to display the full list of representations available in a new browser tab.
Order of Representation Delivery Services

You can determine whether electronic or digital services appear first in the View It tab. Select **Electronic, Digital** or **Digital, Electronic**.

Filtering the Library List for Availability in Primo

You can 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.

**Note**

This functionality is not applicable to Primo VE and Alma-Summon environments.

You control this list on the Primo View Mapped into Alma Libraries page (**Configuration Menu > Fulfillment > Discovery Interface Display Logic > Primo View to Libraries**).

To add libraries to the list of initial libraries:

1. On the Primo View Mapped into Alma Libraries page, for each library enter the library name to display and the library code. To find library names and codes, see **Adding/Editing Institution Libraries**.

2. When you are done, click **Customize**.

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
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 forms are customized on the following pages:

- Hold Request Form - [Configuration Menu > Fulfillment > Discovery Interface Display Logic > Hold Request Form Customization](#)

- Booking Request Form - [Configuration Menu > Fulfillment > Discovery Interface Display Logic > Booking Request Form Customization](#)
To customize the visible fields on a Primo request form:

- Digitization Request Form - Configuration Menu > Fulfillment > Discovery Interface Display Logic > Digitization Request Form Customization

Digitization Request Form Customization Page

Booking Request Form Customization Page
1. On the relevant page (see above), for each field that you want to change, click 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. Click 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.

Access the Resource Sharing Form Customization page (Configuration Menu > Fulfillment > Discovery Interface Display Logic > Resource Sharing Form Customization).
## Resource Sharing Form Customization

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<td></td>
<td></td>
<td>Comment</td>
<td></td>
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<td></td>
<td></td>
<td>Maximum fee</td>
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<td></td>
<td></td>
<td>Land of Service</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. Click 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. Click 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. Click 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).

---

**Note**

The Copyright and Copyright statement fields in the Delivery information fields section must be kept together but are not programmatically restricted to move as a together as a group.

---

**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. Click 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. Click Save.
General

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.
For more information on these jobs, see Viewing Scheduled Jobs.

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. 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:

  ◦ 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 loan. Setting the resend_courtesy_notices parameter to true (see Configuring Other Settings) allows the notification to be sent daily until the item is due.
  ◦ 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.

  In the Days before due date field, enter the number of days before the loan’s due date that a reminder notice is sent or that the loan is automatically renewed.

---

**Note**

This setting can also be configured on the Configuration Menu > Fulfillment > General > Other Settings Mapping Table page. Modify the auto_renew_loan_days parameter value (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 resend_courtesy_notices parameter is set to true and 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.

---

• **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.
  
• **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.
  
• **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.


• Users - Remove Blocks - See Users - Remove Blocks job.

• Activate/Deactivate Courses - See Activate/Deactivate Courses job.

• Distribute Resource Sharing Network Configuration (only in the Network Zone) - 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.

• 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 Notification to Users (only in Leganto-enabled institutions) - See Notifications in the Leganto Administration Guide.

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 Fulfillment 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**

For questions and answers about anonymization, see the Data Privacy FAQs.

**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 resource sharing requests** to enable deleting user information in completed and deleted resource sharing requests.

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:

Loan History After Anonymization

For anonymization to occur in Alma Analytics, first the Handle Historical Archiving job must be run and then the ETL must occur. After anonymization, none of the user details are displayed in Analytics; however, the following information is displayed:

- Patron Details > Patron group (called User Group in Alma)
- Patron Details > Patron job title (called Job Category in Alma)
- Patron Details > Record type (Public, Staff, or Contact)
- Patron Details > Account type (Internal or External)

Analytics After Anonymization

To configure the Loan Anonymization Rules:
1. After selecting **Anonymize item loans**, click the link for **Loan Anonymization Rules**. Or access the **Loan Anonymization Rules** page directly from the menu (Configuration Menu > Fulfillment > Physical Fulfillment > Loan Anonymization Rules).

2. Add a new rule or edit an existing rule.

3. Options for input parameters are:
   - **Days since loan ended** - Operators are: <, >, =, not equals. Whole numbers are counted. So if Days since loan ended > 1 and the loan ended yesterday, the loan will not be anonymized.
   - **Days since user expiry** - Operators are: <, >, =, not equals. Whole numbers are counted. So if Days since user expiry > 1 and the user expired yesterday, the loan will not be anonymized.
   - **Library** - Optional operators are: =, in list, is empty, is not empty, not equals, not in list, contains.
   - **Location** - Operators are: =, in list, is empty, is not empty, not equals, not in list, contains. If Library input was added, the location list will be populated according to the selected libraries. If library library input was not added, the list will be empty.
   - **Number of loans to retain** - Operators are: =. For example, if a rule is set with Number of loans to retain = 3 and there are 3 loan history records for an item, they will not be anonymized. If there are 4 loan history records for the item then only the oldest one will be anonymized.
   - **User group** - Optional operators are: =, in list, is empty, is not empty, not equals, not in list, contains.

4. Select **True** or **False** for the output parameter, **Anonymize**.

5. Click **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).
The following table describes the Other Settings options:

<table>
<thead>
<tr>
<th>Parameter Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>auto_renew_loan_days</strong></td>
<td>The number of days entered determines which loans will be considered for automatic renewal. So, for instance, if <code>auto_renew_loan_days</code> contains 7, all loans whose due date is within the next 7 days will be considered. For those loans, the renewal will be carried out as per the automatic renewal policies. See Configuring Automatic Loan Renewal Rules.</td>
</tr>
<tr>
<td><strong>check_self_ownership_serial</strong></td>
<td>Set to <code>true</code> to enable self-ownership checks to be performed for serial titles; the Resource Sharing link is hidden in the Get It/View It tabs in Primo. When <code>false</code>, self-ownership checks are not performed for serial titles, and the Resource Sharing link displays in Primo whether or not the serial is self-owned.</td>
</tr>
</tbody>
</table>
| **copyright_region**         | The two letter country code indicating the institution's region. Used for determining copyright licensing options and approval. Currently, the only values that have any effect are:  
  - UK - Alma adds additional UK-related options to the Source for Copyright field (see Creating a Request). In addition, Leganto integration with the UK Copyright Licensing Agency (CLA) and the Digital Content Store (DCS) is enabled; see Integrating with the UK's Digital Content Store (DCS).  
  - AU (Australia) - Alma adds additional AU-related options to the Source for Copyright field (see Creating a Request) and the Creative Commons License field (see Managing Citations). |
<p>| <strong>demerit_enable</strong>           | Set to <code>true</code> to enable demerit functionality. For more information, see Enabling the Demerit System. |
| <strong>demerit_history_days</strong>     | The length of the demerit tracking period in days. If the user's demerit points exceed the value specified in the demerit maximum_threshold parameter during the demerit tracking period (that is the last number of days specified by this parameter), the system places a block on the user. For more information, see Enabling the Demerit System. |</p>
<table>
<thead>
<tr>
<th>Parameter Key</th>
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</tr>
</thead>
<tbody>
<tr>
<td>demerit_maximum_threshold</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>demeritSuspension_days</td>
<td>The length of a user's suspension period in days. For more information, see <a href="#">Enabling the Demerit System</a>.</td>
</tr>
<tr>
<td>display_additional_digitization_attributes</td>
<td>Set to <strong>true</strong> to show the partial digitization fields on the Get It form. Set to <strong>false</strong> 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 <a href="#">Configuring Fulfillment Information in the Network Zone</a>.</td>
</tr>
<tr>
<td>document_delivery_cleanup_days</td>
<td>This defines the number of days that digitized files will remain on the document server. It is set to a default of 30, and may be set to a maximum of 90 days. See <a href="#">Attaching Digitized Items To Be Sent To a Patron</a>.</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>The parameter defaults to true, which enables booking requests to behave as all other patron physical requests. If the parameter is false, the booking request does not get activated or go through the hold shelf workflow and will not appear in task lists.</td>
</tr>
</tbody>
</table>
| enable_moving_item_to_hold_shelf_from_self_check | 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 hold shelf letter is not sent. If set to **true**, the item is placed on the hold shelf and a 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. |
<p>| enable_request_during_loan_for_different_policy | Set to <strong>true</strong> 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. |
| exclude_lost_and_claimed_returned_loans_from_overdue | Set to <strong>True</strong> to exclude lost and claimed returned loans from the overdue limit (number of loans that are allowed to be overdue). |</p>
<table>
<thead>
<tr>
<th>Parameter Key</th>
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</tr>
</thead>
</table>
| ful_network_default_pickup_inst                  | This controls the initial value of the pickup institution field in a fulfillment network request form.  
• If the parameter's value is set to **blank**, the initial value of the pickup institution is blank.  
• If the parameter's value is set to **patron**, the initial value is set to the patron's institution, meaning that linked account users will show the patron's source institution.  
• If the parameter's value is set to **local**, the initial value is set to the local institution, as it has been in the past. This is the default.                                                                                                                  |
| fulfillment_network_shared_primo                | 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.                                                                                     |
| generate_resource_sharing_temp_barcode          | 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).                                |
| hide_single_holding_getit_details               | 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. |
| ignore_lender_due_date                          | Set to **true** 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.                                                                                                           |
| ill_item_creation_lib_code                      | The default code of the library in which to create the temporary items for resource sharing.  
When working with multicampus libraries, leave this value blank and assign a resource sharing library in the patron record.  
Set to **ALL** 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.  |
| ill_item_creation_loc_code                      | The default code of the location in which to create the temporary items for resource sharing.  
When working with multicampus libraries, leave this value blank and do the following:  
• Assign a resource sharing library in the patron record.  
• Configure a default location for borrowing when configuring resource sharing information for a library (see Configuring Parameters of a Resource Sharing Library).                                                                 |
<p>| item_level_requesting                           | Set to <strong>true</strong> in order to set items without descriptions to requestable from the item level link in the Primo Get It tab. When this option is active, the item request replaces title level requesting. If set to <strong>false</strong>, which is the default, items without descriptions are requested via title level requesting. See Request Options. |
| missing_item_requestable                        | Set to <strong>true</strong> to enable requesting items marked as missing.                                                                                                                                                                                                                                                                         |
| network_display_logic_distribution_members_behavior | Controls deactivation or deletion of institution rules at distribution time. The values for this parameter are <strong>None</strong>, <strong>Remove</strong>, and <strong>Deactivate</strong>. The parameter defaults to <strong>None</strong>, which does not change the institution rules. <strong>Remove</strong> will remove all institution rules. <strong>Deactivate</strong> will deactivate all institution rules. |</p>
<table>
<thead>
<tr>
<th>Parameter Key</th>
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</tr>
</thead>
<tbody>
<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 parameter defaults to False, which sets the institution rule to taking precedence. True defines the Network Zone rule as having precedence.</td>
</tr>
<tr>
<td>New for December! 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 will remove all the local records. Deactivate will retain 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 will be executed first when running the Distribute central resource sharing configuration job.</td>
</tr>
<tr>
<td>network_sending_rules_precedence</td>
<td>Whether the Network, Institution, or Library level sending borrowing request rules will be executed first when running the Distribute central resource sharing configuration job.</td>
</tr>
<tr>
<td>New for December! network_user_profiles_and_assignment_rules_distribution_members_behavior</td>
<td>Controls what is done with the members' user profiles and assignment rules when the Network Zone's records are distributed. Valid values are: Remove and None. Remove will remove all the local records. None, which is the default, leaves all previously existing records exactly as they were before the distribution.</td>
</tr>
<tr>
<td>overdue_at_claim_return_loan</td>
<td>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.</td>
</tr>
</tbody>
</table>
| 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 the parameter is 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 will be applied. |
| overdue_lost_loan_profile_ignore_due_hour | Allows control of whether the due hour will be taken into consideration. For example, if the profile is set to match on 1 overdue date and the parameter is set to false, then a loan that was due yesterday at 12:00 will be considered overdue only today at 12:01. If the due hour of the loan has not been reached when the job runs, the loan will not be considered overdue until the following day. If set to true, the loan will be considered a match immediately on the next day, ignoring the due hour. The default is false. |
| patron_services_timeout_minutes | 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. |
<table>
<thead>
<tr>
<th>Parameter Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>prefer_doc_delivery_from_e-resources</td>
<td>Set to <strong>true</strong> 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 <strong>true</strong> 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 <strong>ascending</strong> and <strong>descending</strong>.</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 <strong>TITLE</strong>, <strong>AUTHOR</strong>, <strong>CALLNUMBER</strong>, <strong>CREATEDATE</strong>, or <strong>INSTRUCTORORDER</strong> (Leganto only: this sets the order according to the ordering set by the instructor in Leganto). The default value is <strong>TITLE</strong>. See <a href="#">Managing Citations</a>.</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 <strong>true</strong> to recall the oldest loan instead of recalling the item which is currently being loaned. Set to <strong>false</strong>, which is the default behavior, to recall the current loan.</td>
</tr>
<tr>
<td>remember_last_loan_display</td>
<td>Set to <strong>true</strong> 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 <strong>false</strong>, only loans for the current session (This session) display.</td>
</tr>
<tr>
<td>renew_all_loan_threshold</td>
<td>Setting this parameter to anything higher than 0 defines that number as the max loans that may be renewed simultaneously with the Renew All action from Primo My Account. If the user attempts to renew more loans than the threshold, alma returns a new error code, 0037, and a new (translated) error message, Renew All is allowed for loan lists with no more than X loans, where X is the customer parameter value. The default value of 0 indicates no limit on the number of loans that can be renewed at once.</td>
</tr>
<tr>
<td>resend_courtesy_notices</td>
<td>Controls the behavior of the Automatic Renewal job (Notifications - Send Courtesy Notices and Handle Loan Renewals). When set to <strong>true</strong>, the job will run on loans with a due date from the last run date until today plus the value of <strong>auto_renew_loan_days</strong>. 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 will be sent every day until the day the item is due. When set to <strong>false</strong>, which is the default, the courtesy notices are not resent.</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 <a href="#">Resource Sharing Request</a> page.</td>
</tr>
<tr>
<td>results_best_location_enable</td>
<td>Set to <strong>true</strong> to prioritize the results list according to your location when using Get It and RTA services. The default setting is <strong>false</strong>. For physical items, setting the value to <strong>true</strong> 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 <strong>false</strong> 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.</td>
</tr>
</tbody>
</table>

Ex Libris, a ProQuest Company
<table>
<thead>
<tr>
<th>Parameter Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<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>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. For more information, see Customizing Primo Resource Sharing Request Forms.</td>
</tr>
<tr>
<td>rs_allow_actions_on_scan_in</td>
<td>This parameter allows or prevents receiving and shipping from the Scan In Items page as well as shipping from Manage Items Returns and loaning from Manage Patron Services when the item has not been received. When set to false, an error message with an override option will be displayed when a borrowing or lending request is scanned in from the Scan In Items page at a desk of a resource sharing library or when a loan is executed from the Manage Patron Services page but the item has not yet been received. An error message will also appear on the Manage Items Returns page that does not include an override option. When set to true, executing these processes will not produce the error message. The default is true. For more information, see Scanning Items.</td>
</tr>
<tr>
<td>rs_auto_request_lending</td>
<td>Set to true to enable automatically placing Move/Digitization Requests for incoming lending requests that match an existing resource. A move request will be placed if the resource is requested in physical format. A digitization request will be placed if the resource is requested in digital format. The digitization department and pickup location for the resource are specified in the rs_default_digitization_department and rs_default_pickup_location parameters, respectively.</td>
</tr>
<tr>
<td>rs_auto_request_lending_with_serials</td>
<td>If a lending request is created and is associated with at least one serial item, setting this parameter to false will stop an associated move request from being automatically created. If the parameter is set to true, the move request will still be created. The parameter defaults to true.</td>
</tr>
<tr>
<td>rs_auto_request_lending_with_volume_issue</td>
<td>Set to false to prevent a move request from being automatically created for a lending request if the borrowing request sent to the lender contains a volume or issue because the move request may not identify the correct volume or issue. The default for this parameter is true, which corresponds to the existing functionality. This parameter has no effect on borrowing requests that do not contain a volume or issue.</td>
</tr>
<tr>
<td>rs_block_sending_requester_info</td>
<td>Allows patron information to be suppressed from a resource sharing request that is sent to another institution. The parameter is set to false by default. When it is set to true, the Send Requester Information check box on the ISO partner parameters is hidden.</td>
</tr>
<tr>
<td>rs_borrower_copyright_management</td>
<td>Set to true to apply a check of copyright approval on a resource sharing digital borrowing request. Setting this parameter to true also displays the Copyright Status page on the fulfillment configuration menu (see Configuring Resource Sharing Copyright Statuses).</td>
</tr>
<tr>
<td>Parameter Key</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>rs_default_digitization_department</td>
<td>The name of the digitization department to which the resource that matches a lending request is to be moved.</td>
</tr>
<tr>
<td>rs_default_pickup_location</td>
<td>The pickup location for the resource that matches the borrowing request, in the following format: <code>&lt;library code.location code&gt;</code></td>
</tr>
<tr>
<td>rs_disable_borrowing_auto_assign</td>
<td>Set to false to automatically assign borrowing requests to the logged in operator for requests created manually or saved in Alma. If you do not want borrowing request to be automatically assigned, set the parameter to true. This is the default value. For more information, see Reassigning a Task.</td>
</tr>
<tr>
<td>rs_disable_lending_auto_assign</td>
<td>Set to true to ensure that when editing a resource sharing lending request that is either unassigned or assigned to other users (that is, the request appears on the Unassigned or Assigned to Others tab on the Resource Sharing Lending Requests Task List page), the request is assigned to the editing user only when clicking Reassign for the request. When selecting any other editing option, the request remains either on the Unassigned or Assigned to Others tab. Indicate false to ensure that selecting any editing option automatically assigns the request to the editing user (that is, the request moves to the Assigned to Me tab).</td>
</tr>
<tr>
<td>rs_display_items_not_requestable</td>
<td>Set to true to display items that are not requestable in the physical services list in Manage Fulfillment Options of lending requests. This is the default value. Set to false to suppress items that are not requestable.</td>
</tr>
<tr>
<td>rs_display_level_of_service</td>
<td>Set to true 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 true to show a warning pop-up before automatically creating a lending request from a shipping item. Set to false to automatically create the request without the warning message. For more information, see Shipping Items.</td>
</tr>
<tr>
<td>rs_external_id_prefix</td>
<td>This sets the external identifier format. Possible values are code or id. If set to code, the external ID is created as (institution code + a generated number) (as it was previously). If set to id, the external ID is created as (customer Id + institution id + a generated number).</td>
</tr>
<tr>
<td>rs_prefer_recall_method</td>
<td>Set to true 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 Recall item action. Set to false to recall the locally loaned copy first.</td>
</tr>
<tr>
<td>rs_specific_edition_only_default</td>
<td>Set to True (which is the default) to select the Specific Edition Only check box when opening the resource sharing request form in Primo.</td>
</tr>
<tr>
<td>rs_support_add_service</td>
<td>Set to true for the Alternative address field to display on resource sharing request forms.</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>Parameter Key</td>
<td>Description</td>
</tr>
<tr>
<td>---------------</td>
<td>-------------</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>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 the parameter is set to true, the item will be checked out automatically to the sponsor. If the user is a proxy for more than one user, the existing behavior will remain. 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.</td>
</tr>
<tr>
<td>send_query_to_patron_use_xsl</td>
<td>Set to true to replace the Patron Query Templates option on the Fulfillment Configuration menu with the Patron Query 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>
</tbody>
</table>
| shortened_due_date_notifications | The possible values are NONE, MESSAGE, EMAIL, MESSAGE_EMAIL (in caps). The parameter defaults to NONE meaning no notification is sent. 

If the parameter is 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:

- Please notice that the due date was shortened since the item is recalled
- Please notice that the due date was shortened since the patron card is expired before the due date
- Please notice that the due date was shortened since the loan conflicts with a booking request

When loaning an item from a self-check machine, a message is also displayed.

**Note**

The message text is not configurable.

In addition, when the parameter is set to EMAIL or MESSAGE_EMAIL, a notification is sent to the patron regarding the shortened due date. The letter FulShortenedDueDateLetter can be sent either by email or SMS. For letter information, see Configuring Alma Letters. |
<p>| should_anonymize_borrowing_request | Set to true to block viewing the patrons who have placed borrowing requests. false enables viewing this information. |
| should_anonymize_item_loan | Set to true to block viewing the patrons who have borrowed returned items. false enables viewing this information. |
| should_anonymize_requests | 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. |</p>
<table>
<thead>
<tr>
<th>Parameter Key</th>
<th>Description</th>
</tr>
</thead>
</table>
| should_automatically_print_request_slip | When set to **true**, print slips will be generated automatically according to any Automatic Printing rules that have been configured.  
When set to **false**, print slips will NOT be generated automatically, regardless of any Automatic Printing rules that have been configured.  
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 will appear 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 will appear 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 will appear 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 the parameter 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_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.  
For more information on customizing the Digitization Request Form, see [Customizing Primo Request Forms](#). |
| uresolver_remote_register | This controls whether the other institution's holdings may be retrieved without creating a local linked patron record.  
Set to **Auto** to automatically create a linked account. This is the default.  
Set to **None** to disallow the option to create a linked account via the Get It. Only holdings information will therefore be shown.  
Set to **& Manual** to display a link to sign into the institution. Clicking the link will open the request form from the source of the linked account.  
For more information, see [Requesting From Other Institutions Without a Local Linked Patron](#). |
## 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 connection of local or network printers. Instead, printing in Alma works using email. 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.

You configure printers on the Printers page (Configuration Menu > Fulfillment > General > Printers).

### Printers Page

**Note**

Ensure that you are within the context of the institution/library whose printers you want to configure by selecting the required institution/library from the **You are configuring** filter on the Fulfillment Configuration page.

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** drop-down list on the Fulfillment Configuration page (Configuration Menu).

Click the printer code or name headings to sort the list alphabetically—in ascending or descending order—by printer code or name.

The following actions can be performed on this page:

- 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: drop-down list on the Fulfillment Configuration page (Fulfillment > Fulfillment Configuration > Configuration Menu).

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), click 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. Click **Add and Close** to close the dialog box. The defined printer is added to the list of printers on the Printers page.

![Printers Page](image)

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, click 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.

3. In the **Served Circulation Desks List** section, select a circulation desk that is served by the printer, and click **Attach Circulation Desk**. The selected circulation desk is added to the list of circulation desks that are served by the printer. This section displays only when you are configuring a library (that is, you have selected a library in the **You are configuring**: drop-down list on the Fulfillment Configuration page – **Fulfillment > Fulfillment Configuration > Configuration Menu**).

4. Repeat the previous step for all circulation desks that are served by the printer.

5. In the **Served Service Units List** section, select the service unit that is served by the printer, and click **Attach Service Unit**. The selected service unit is added to the list of service units that are served by the printer.

6. Repeat the previous step for all service units that are served by the printer.
7. Click **Save** to store your changes to the printer information.

### Configuring Article and Book Form Mandatory Fields

To configure mandatory fields in article and book forms, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can designate specific fields as mandatory when configuring resource sharing requests. You can also group several fields together so that at least one of the fields is required to be completed when submitting resource sharing requests.

Fields can be assigned as mandatory for requests made for an article and/or a book.

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**Note**

To remove a service unit from the list of service units that are served by the printer, click **Remove** to the right of the service unit to be removed.

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**Note**

The configured mandatory fields also appear as mandatory in the Primo resource sharing form, in reading list citation forms, and when cataloging brief records.

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You configure mandatory fields for 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](image)
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), click 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, click Restore.

3. Click Save. The indicated fields display as mandatory on the relevant Resource Sharing Lending Request or Resource Sharing Borrowing Request page.

To configure a group in which one field is mandatory:

1. On the Mapping Table page for an article or a book (Configuration Menu > Fulfillment > General, select Article Form Mandatory Fields or Book Form Mandatory Fields), click 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, click Restore.

3. Click Save. At least one of the indicated fields must be configured on the relevant Resource Sharing Lending Request or Resource Sharing Borrowing Request page.

Note

Ensure that you are within the context of the institution whose resource sharing library form mandatory fields you want to configure by selecting the required institution from the You are configuring filter on the Fulfillment Configuration page.
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.