



## Advanced Fulfillment Configuration



# Agenda

## *1 Introduction*

2 General Configurations

3 Physical Fulfillment

4 Patron Configurations

5 Display and General Fulfillment

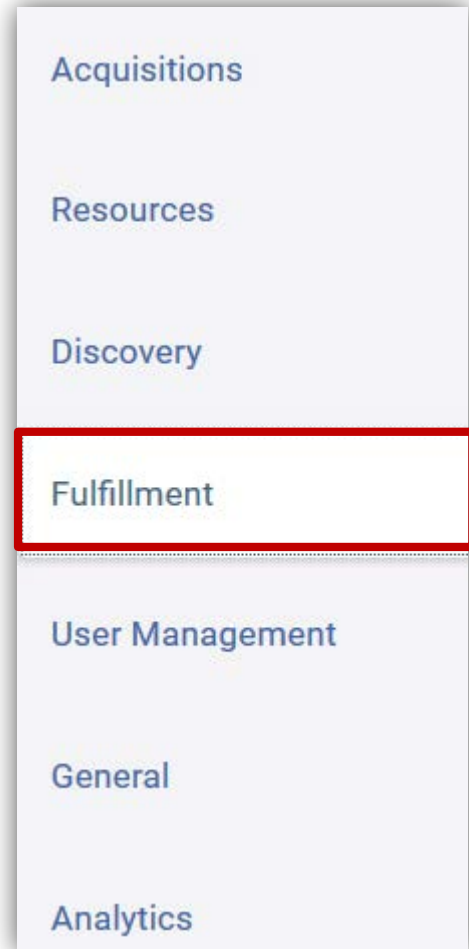
6 Summary & Resources



# Introduction

## ROLES

- General System Administrator
- Fulfillment Administrator



# Objectives

- Gain a general overview of fulfillment administration
- Opportunity to review configurations made during implementation
- Identify settings that affect Fulfillment behavior
- Develop better troubleshooting techniques



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1 Introduction

**2 *General Configurations***

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6 Summary & Resources



# I. Services to Another Library

## Fulfillment relationships between libraries

### Services between libraries.

- Deliver to
- Circulate for
- Acquire for

# I. Configure Relationships for a Library

Configuring

Main Library

Discovery

Fulfillment

General

Filter List

Look-up or select

Library Management

Library Details

Opening Hours

Relationships

Circulation Desks

Locations

Relation Type : All

	Name	Description	Deliver To	Circulate For	Acquire For
1	<input type="checkbox"/> All	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	<input type="checkbox"/> Resource Sharing Library	Temporarily manages inventory that is sent to or received from resource sharing partners	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## II. Indicate Library Closed on Specific Day

Configuring

Main Library

Filter List

Look-up or select

Discovery

Fulfillment

Library Management

Library Details

**Opening Hours**

Relationships

General

### Main Library

Organization Unit Type Code: MAIN

Library: MAIN

Path: TRAIN\_1.TRAINING\_1\_INS...

Description: Supports undergraduate le...

Summary | Contact Information | Calendar Management | IP Definitions

Full Calendar | Apply Changes | + Add Record

	Inherited	Record type	Description	Valid from	Valid to	From hour	To hour	Recurrence	Recurrence Type	Day of week	Status
1	✓	Event	End of Year	2014/0...	-	-	-	No	-	-	Open
2	✓	Event	End of Summer	2014/0...	-	-	-	No	-	-	Open
3	✓	Event	End of Term	2014/1...	-	-	-	No	-	-	Open
4		Standa... opening hours	Open 10:00-20:00	2016/0...	2019/0...	10:00	20:00	Yes	-	Sunday	Open
5		Standa... opening hours	Open 00:00-23:59	2016/0...	2019/0...	00:00	23:59	Yes	-	Monday	Open



# Closed Days and Policies

## Physical Fulfillment

Fulfillment Units

**Terms of Use and Policies**

Block Preferences

Auto Loan Renewal Rules

9	Lost Item Replacement Fee Refund Ratio	100 Percent Lost Item Refund (Default lost item replacem	▼
10	Maximum Fine	25.00 Maximum Fine (25.00 Maximum Fine)	▼
11	Overdue Fine	2.50 Open Days Overdue Fine (2.50 Open Days Overdue Fi	▼
12	Recalled Overdue Fine	3.50 All Days Recalled Overdue Fine (3.50 All Days Recalle	▼
13	Grace Period	1 Days Grace Period (1 Days Grace Period)	▼
14	Is Renewable	Renewable (Is item renewable)	▼
15	Maximum Renewal Period	365 Days Maximum Renewal Period (365 Days Maximum	▼
16	Closed Library Due Date Management	Move to the end of the next open day (Move to the end of 1	▼
17	Cancelled Recall Due Date	Attempt automatic renewal (This option will keep the due	▼

# III. Change a Delivery Time

Library Management

Opening Hours

**Transit Time**

SIP2 Bin Configuration



**Never give a lady a restive horse; a 19th century handbook of etiquette.**

**Book** By Hill, Thomas E. (New York, World Pub Co [1969, c1967])

**Barcode:** 02815

**Update Date:** 2016/07/08

**Library:** Main Library

**Process type:** Transit

**To Library:** Main Library

**Expected Arrival Time:** 2018/05/21

**On Hold Expiration Date:** -

**Due Date:** -

**Needed By:** -

**Until:** -

**Permanent Location:** Stacks

[Other details](#)

**Call Number:** BJ1852 .H6 1969

**Status:** Item not in place

**Due back:** -

**Material Type:** Book

Book

☆ **Never give a lady a restive horse; a 19th century handbook of etiquette.**  
Thomas E. Hill (Thomas Edie), 1832-1915. 1969, c1967

● **Checked out from Main Library Stacks (BJ1852 .H6 1969 )**

[Get It](#) [Details](#) [Virtual Browse](#)

01EXL - TRAINING\_1\_INST - Master [Sign-in for more options](#) [Action](#)

Request Options:

Location	Main Library	Stacks	BJ1852 .H6 1969	<a href="#">Hide Details</a>
----------	--------------	--------	-----------------	------------------------------

Availability: (1 copy, 0 available, 0 requests)

1 - 1 of 1 Records

Barcode	Type	Policy	Description	Status
02815	Book	Loanable		In transit until 2018/05/21



# Transit Time Rules

← Transit Time Rules Cancel

---

Institution Rules List ▼

Calculate ETA + Add Rule 📄 ⚙️

Filter : All ▼

	Enabled	Move Up	Move Down	Rule Name	Description	Updated By	Update Date	
1	<input checked="" type="checkbox"/>		▼	Delivery Rule 1	Delivery from Main Library to Resource Sharing Library	Implementer, Ex Libris	2016/04/25	⋮
2	<input checked="" type="checkbox"/>	▲	▼	Graduate Library to Main Library	Graduate Library to Main Library	Implementer, Ex Libris	2016/04/25	⋮
3	<input checked="" type="checkbox"/>	▲		Music Library to Science Library	-	Implementer, Ex Libris	2016/02/08	⋮

---

Default Rule ▼

📄 ⚙️

	Rule Name	Description	Updated By	Update Date	
1	Default Transit Time	Default time of transit 12 hours	Connie Braun	2012/05/02	⋮

# Transit Time Rules

## < Transit Time Rules Editor

### Transit Time Rules Editor

Name	Delivery Rule 1		
Description	Delivery from Main Library to Resource Sharing Library		
Created By	Svetlana Smirnov	Created On	2012/01/24
Updated By	Implementer, Ex Libris	Updated On	2016/04/25

### Input Parameters

From	In List	Main Library
To	In List	Resource Sharing Library
Material Type	=	Book
Item Location	=	Any
Start Time	After	9:00

### Output Parameters

Delivery Time 5

## IV. Add a New Location

Configuring

Science Library

Discovery

Fulfillment

General

Filter List

Look-up or select

**Library Management**

- Library Details
- Opening Hours
- Relationships
- Circulation Desks

**Locations**


- Physical Locations

	Code	Name	Location Type	Fulfillment Unit
1	SCICOURSE	Science Course Reserves	Closed	Short Loan
2	SCILOWER	Science Lower Level	Closed	Closed
3	bioper	Science Periodicals	Open	Limited
4	biores	Science Reference	Open	Limited
5	biology	Science Stacks	Open	General


# Location Associated with Circulation Desk

Physical Location Details


Location Code \* **biology**

Location Name \*  

External Location Name




Location Type \* **Open** 


Remote Storage

Fulfillment Unit **General** 


Map


Physical Location Circulation Desks List

Name   [Actions](#) [Attach Existing Circulation Desk](#)  

Code	Name	Description	Check In	Check Out	Reshelve	
1	DEFAULT_C...	Circulation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Holdings Configurations

Accession Placement **None** 

Call Number Type **Library of Congress classification** 

Suppress from Discovery





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- 1 Introduction
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- 3 *Physical Fulfillment***
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# I. Add or Change a Borrowing Policy

Policy Type **Due Date**

Policy Name \*  

Policy Description  

Value Type \*  Fixed  Non Fixed

Value \*

Unit Of Measurement \*

At(HH:MM) – If empty, the library's closing time will be used

Default Policy  False  True

Terms of Use Details

Name \*

Description

Terms of Use Policies

	Policy Type	Policy Name
1	Is Loanable	<input type="text" value="Loanable (Loanable)"/>
2	Is Recallable	<input type="text" value="Recall Allowed (Recall is possible)"/>
3	Due Date	<input type="text" value="1 Day Loan (1 Day Loan)"/>
4	Requested Item Due Date	<input type="text" value="No Requested Due Date (Default value - No Requester)"/>
5	Recall Period	<input type="text" value="No Recall Due Date (Default Recall Due date - none)"/>
6	Renew Fee	<input type="text" value="No Renewal Fee (Default No Renewal Fee)"/>
7	Lost Item Fine	<input type="text" value="10.00 Lost Item Fine (10.00 Lost Item Fine)"/>



## II. Add or Update an Exception for an Item

Fulfillment Unit Rules Editor



Name \* **1 Day Loan for Faculty - Reference**

Description **1 Day Loan for Faculty - Reference**

Created By **Ex Libris** Created On **2018/05/20**


Updated By **Ex Libris** Updated On **2018/05/20**

Input Parameters

+ Add Parameter  

Name	Operator	Value	
1 Item Policy	In List	Reference	...
2 User Group	In List	Faculty	...

Output Parameters

Terms of Use \* **1 Days Faculty Limited**  **TOU Details** **Add Terms Of Use**

# Item Policy

## Item Policy



<b>Table code</b>	ItemPolicy	<b>Table Description</b>	Physical item policy
<b>Patron Facing</b>	Yes		
<b>Customization mode:</b>	Entire table needs to be customized		

[Import](#)
[Restore Default Translations](#)
[+ Add Row](#)



Filter: **English**

	Move Up	Move Down	Code	Description	Translation	Default Value	Updated By	Last Updated	
1		▼	OneDayLoan	1 Day Loan	1 Day Loan	<input type="radio"/>	exl_impl	2013/09/10	...
2	▲	▼	TwoDayLoan	Two Day Loan	Two Day Loan	<input type="radio"/>	exl_impl	2013/09/10	...
3	▲	▼	TwoHourLoan	Two Hour Loan	Two Hour Loan	<input type="radio"/>	exl_impl	2013/09/10	...
4	▲	▼	TwoWeekLoan	Two Week Loan	Two Week Loan	<input type="radio"/>	exl_impl	2013/09/10	...
5	▲	▼	ThreeDayLoan	Three Day Loan	Three Day Loan	<input type="radio"/>	exl_impl	2013/09/10	...
6	▲	▼	FourDayLoan	Four Day Loan	Four Day Loan	<input type="radio"/>	exl_impl	2013/09/10	...
7	▲	▼	InterlibraryLoan	Interlibrary Loan	Interlibrary Loan	<input type="radio"/>	exl_impl	2013/09/10	...
8	▲	▼	NotforLoan	Not for Loan	Not for Loan	<input type="radio"/>	exl_impl	2013/09/10	...

# III. Indicate When an Item is Lost

Overdue and Lost Loan Profile Record Cancel Save

Name \* **Lost Loan Rules**

Description

Active

Profile Type \* **Change to lost**

Days After Due Date **30**

Days After Status Date **0**

Loan Status **Normal**

Library

Item policy

Letter send format \* **Both**

Days  Open Days

Days

User Group **Faculty** **Academic Staff** **Alumni**

Locations

Material Type

Printer **Clean Training - Alma Printing**



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# I. Change Maximum Number of Requests Allowed

**Patron Limits Definitions**

**Table Description** Patron Limits Definitions  
**Customization mode:** Entire table needs to be customized

**Patron Configurations**

- Patron Groups
- Patron Limits
- Loan Limits
- User Block Description
- User Block Definitions
- User Demerits

	User group	Max. cash	Max. overdues	Max. bookings	Max. overdue recalls	Max. digitization requests
1	Undergrad	100.00	10	2	1	5
2	Graduate	100.00	15	3	2	5
3	CONSORT	100.00	10	2	1	5
4	Part-time	100.00	10	2	1	5
5	Faculty	250.00	25	5	3	10
6	Academic	250.00	25	3	2	10
7	Alumni	25.00	3	1	0	3
8	Guest	25.00	3	1	0	3
9	Staff	250.00	25	3	2	10

**User group** dropdown menu:

- Academic Staff

**Max. cash** input field:

**Max. overdues** input field:

**Max. bookings** input field:

**Max. overdue recalls** input field:

**Max. digitization requests** input field:

**Max. physical item requests** input field:

## II. Configure Number of Concurrent Loans

Loan Limit Rules Car

Filter : All ▾

	Enabled	Move Up	Move Down	Rule Name	Description	Updated By	Update Date	
1	<input checked="" type="checkbox"/>		▾	Staff	-	Implementer, Ex Libris	2016/04/26	...
2	<input checked="" type="checkbox"/>	▲	▾	Undergraduate Student	-	Implementer, Ex Libris	2018/05/20	...
3	<input checked="" type="checkbox"/>	▲	▾	Community Borrower	-	Implementer, Ex Libris	2012/11/16	...
4	<input checked="" type="checkbox"/>	▲	▾	Inter-Library Loan	-	Implementer, Ex Libris	2018/05/20	...
5	<input checked="" type="checkbox"/>	▲	▾	Graduate Student	-	Implementer, Ex Libris	2018/05/20	...
6	<input checked="" type="checkbox"/>	▲	▾	Faculty	-	Implementer, Ex Libris	2015/02/03	...
7	<input checked="" type="checkbox"/>	▲	▾	Main Location Limit	Main Location Limit	Support, Ex Libris	2013/06/04	...
8	<input checked="" type="checkbox"/>	▲	▾	Students	-	Implementer, Ex Libris	2015/02/03	...
9	<input checked="" type="checkbox"/>	▲	▾	Visitors	-	Implementer, Ex Libris	2015/02/03	...
10	<input checked="" type="checkbox"/>	▲		Undergraduate and Laptop/Laptop Charger	-	Implementer, Ex Libris	2016/02/08	...

# Loan Limit Rules

## Loan Limit Rule Editor

Name \*

Description

Created By **Implementer, Ex Libris**

Created On **2016/02/08**

Updated By **Implementer, Ex Libris**

Updated On **2016/02/08**

## Input Parameters

[+ Add Parameter](#)



	Name	Operator	Value	
1	Material Type	=	Laptop	...
2	User Group	In List	Undergraduate Student	...

## Output Parameters

Loan limit \*



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# I. Change When Services Display In Primo

## Discovery Interface Display

### Logic

Display Logic Rules

Related Records

Direct Linking

General Electronic Services

Viewer Services

Online Services Order

General Electronic Services

## Institution Rules

Remove Selected

Deactivate Selected

Add Rule



	<input type="checkbox"/>	Active	Move Up	Move Down	Rule Description	
1	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="button" value="v"/>	For user groups Alumni: Hide service General Electronic Service with Service = ProQuest if exists service Resource Sharing Request	<input type="button" value="..."/>
2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="▲"/>	<input type="button" value="v"/>	For user groups Alumni: Hide service General Electronic Service with Service = ProQuest if exists service Hold Request	<input type="button" value="..."/>
3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="▲"/>	<input type="button" value="v"/>	Hide service Purchase Request	<input type="button" value="..."/>
4	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="▲"/>		For user groups Alumni: Hide service Booking Request if exists service Booking Request	<input type="button" value="..."/>

# Add Display Logic Rules

For user from groups **Alumni** **Guest** **Part-time**

hide service \* **Digitization**

if exists service **Digitization**

For user from groups **Guest**

hide service \* **Purchase Request**

with

with value


if exists service

## II. Add a Link to a Service in Primo

General Electronic Services Back

+ Add Service 🔗 ⚙️

Active	Service Name	Service Code	Public Name	Service Description	Is this a Document Delivery/ILL service?	Display Location	
<input checked="" type="checkbox"/>	Amazon	Amazon by ISBN	Search for this on Amazon	Links to Amazon by ISBN & ISSN	false	Links	⋮
<input checked="" type="checkbox"/>	ILLiad for Articles/Journ...	ILLIAD-A	Request from Interlibrary Loan	ILLiad link for article and journals	true	Getit & How To Getit	⋮
<input checked="" type="checkbox"/>	ILLiad for Books/Book	ILLIAD-B	Request from Interlibrary Loan	ILLiad link for books and book items	true	Getit & How To Getit	⋮



Book

☆ **The soul of an octopus : a surprising exploration into the wonder of consciousness**  
 Sy Montgomery author. 2015  
● **Available at Science Library Science Stacks (QL430.3.O2 M66 2015 )**

[Get It](#) [Details](#) [Virtual Browse](#)

**01EXL - TRAINING\_1\_INST - Master** [Sign-in for more options](#) Actions 🔗 ✕

Request Options: [Search for this on Amazon](#) 🔗 |

Location: Science Library Science Stacks **QL430.3.O2 M66 2015** [Hide Details](#)

Availability: (1 copy, 1 available, 0 requests)

1 - 1 of 1 Records

Barcode	Type	Policy	Description	Status
2351013562	Book	Loanable		Item in place

# General Electronic Services

**Amazon**

**Service Code** Amazon by ISBN  
**Service Description** Links to Amazon by ISBN & ISSN

Service Details **Service Availability Rules**

Active **Active**

Service Code \* **Amazon by ISBN**

Service Name \* **Amazon**

Service Description **Links to Amazon by ISBN & ISSN**

Public Name **Search for this on Amazon**

Public Note



Is this a Document Delivery/ILL service?  Yes  No

URL Template \* **[http://www.amazon.com/s/ref=nb\\_sb\\_ss\\_c\\_0\\_12?url=search-alias%3Dstripbooks&field-keywords={rft.isbn}{rft.issn}](http://www.amazon.com/s/ref=nb_sb_ss_c_0_12?url=search-alias%3Dstripbooks&field-keywords={rft.isbn}{rft.issn})**



**Amazon**

**Service Code** Amazon by ISBN  
**Service Description** Links to Amazon by ISBN & ISSN

Service Details **Service Availability Rules**

[+ Add Rule](#)  

Filter: All

Enabled	Move Up	Move Down	Rule Name	Description	Updated By	Update Date	
<input checked="" type="checkbox"/>			isbn exists	-	Implementer, Ex Libris	2015/09/17	

# III. Change Form Mandatory Fields

## General

[Fulfillment Jobs](#)

[Configuration](#)

[Other Settings](#)

[Printers](#)

[Article Form Mandatory](#)

[Fields](#)

[Book Form Mandatory Fields](#)

	Name	Restriction Type	Updated By	Last Updated
1	Author Initials	Optional	-	-
2	Barcode	Optional	-	-
3	Author	Mandatory	exLimpl	2016/04/26
4	Publication Date	Optional	-	-
5	DOI	Optional	-	-
6	End Page	Optional	-	-
7	ISSN	Optional	-	-
8	LCCN	Optional	-	-
9	OCLC Number	Optional	-	-
10	Other Standard ID	Optional	-	-
11	PMID	Optional	-	-
12	Publisher	Optional	-	-
13	Remote Record ID	Optional	-	-
14	Additional Person Name	Optional	-	-
15	Chapter	Optional	-	-
16	Issue	Mandatory	exLimpl	2018/05/20
17	Journal Title	Mandatory	exLimpl	2018/05/20

# Book Form Mandatory Fields

	Name	Restriction Type	Updated By	Last Updated
1	Author Initials	Optional	-	-
2	Barcode	Optional	-	-
3	Author	Mandatory	exL_impl	2018/05/20
4	Publication Date	Optional	-	-
5	ISBN	Mandatory	exL_impl	2018/05/20
6	LCCN	Optional	-	-
7	OCLC Number	Optional	-	-
8	Other Standard ID	Optional	-	-
9	Part	Optional	-	-
10	Publisher	Optional	-	-
11	Remote Record ID	Optional	-	-
12	Additional Person Name	Optional	-	-
13	Call Number	Optional	-	-
14	Chapter	Optional	-	-
15	Edition	Optional	-	-
16	Note	Optional	-	-
17	Pages	Optional	-	-
18	Place of Publication	Optional	-	-

## IV. Configure a Second Printer

In Alma printers at institution or library level print via email

An email address must be defined for each printer



# Printers

## General

Fulfillment Jobs

Configuration

Other Settings

Printers

Article Form Mandatory

Fields

Book Form Mandatory Fields

## < Printers

Back

You are configuring: [Clean Training](#) [Change Organization](#)

1 - 2 of 2

Name ▾



+ Add Printer ▾



Code	Name	Email	Description	Serviced Units	
1 ALMA	Alma Printing	almaprint@university.edu	The AlmaPrint email address	Graduate Library Course Reserves, Institutional Preservation Dept, Main Library Course Reserves, Music Library Course Reserves	...
2 MAINUPR...	Main University Printer 2	mnprt2@univeristy.edu	Gladys	Digitization Department For Institution	...



# Printers

Code \*

Name \*

Email \*

Description

Circulation\_Notices

Code CIRCNOTES

Printer Details

Name \*  Email \*

Description

Served Service Units List

Code

Attach Service Unit

No records were found.

Service Unit



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# Summary

**In this session, we covered:**

- **General fulfillment configurations**
- **Physical fulfillment configurations**
  - Policies, item exceptions, loan loans
- **Patron and loan limits**
- **Display configurations for Primo**



Thank you!

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