



# Fulfillment Configuration Utility

For Data Review

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- ❖ What is the Fulfillment Configuration Utility
- ❖ Review of Fulfillment Units, Terms of Use, and Policies
- ❖ Who can use the Fulfillment Configuration Utility and how to access it
- ❖ Why is the Fulfillment Configuration Utility useful
- ❖ How to use the Fulfillment Configuration Utility
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- ❖ Review

# What the Fulfillment Configuration Utility Does

< Fulfillment Configuration Utility Cancel

Patron Identifier \* **ADAMS, AMANDAILEE - FACULTY -** X ☰ ↺ Item Barcode \* **31412007554751** X ☰ ↺ OK

Loan **Request** Booking Overdue and Lost Loan Profiles

**Fulfillment Attributes** ▼

Fulfillment Unit Name **Limited**

Fulfillment Unit Rule **7 Days Faculty Limited**

Terms Of Use Name **7 Days Faculty Limited**

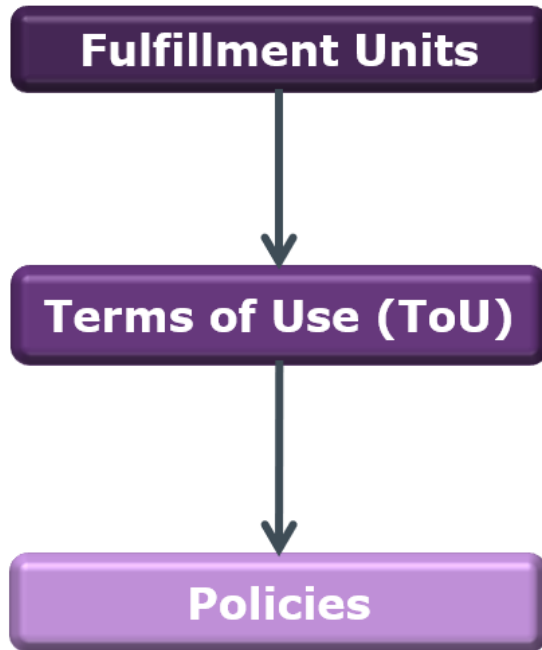
Due date if the item would be loaned now **11/11/2019 23:59:00 CST**

Return date **11/13/2019 24:00** X 📅 Calculate Overdue Fine Overdue fine **4.00 USD**

**Terms of Use Policies** ▼ 🔗 ⚙️

	Policy Type	Policy Name	Policy Description
1	Is Loanable	Loanable	Loanable
2	Is Renewable	Not Renewable	Item not renewable

# Fulfillment Units, Terms of Use, Policies



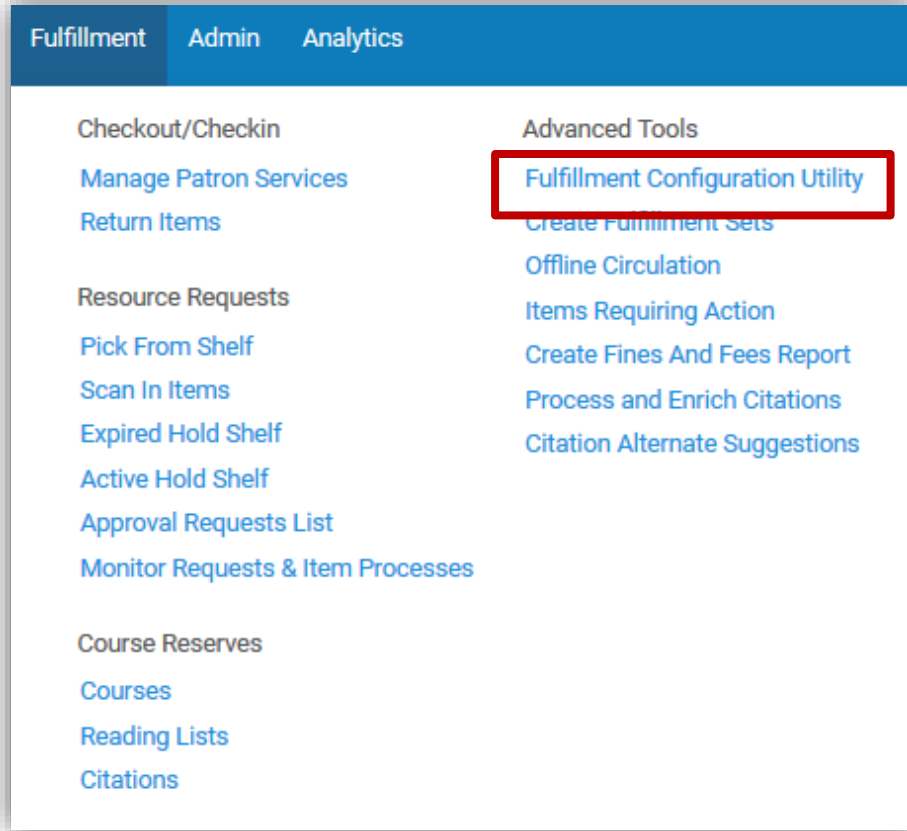
- A grouping of locations that use similar Terms of Use
- A grouping of similar policies (loan-related policies, request-related policies, booking policies, etc.)
- Policies are the smallest elements; they comprise all options for how fulfillment ultimately works in your institution

# Roles

- General System Administrator
- Fulfillment Administrator
- Fulfillment Services Manager
- User Manager
- Circulation Desk Manager
- Circulation Desk Operator



# How to Access the Fulfillment Configuration Utility



**(Fulfillment > Advanced Tools > Fulfillment Configuration Utility)**

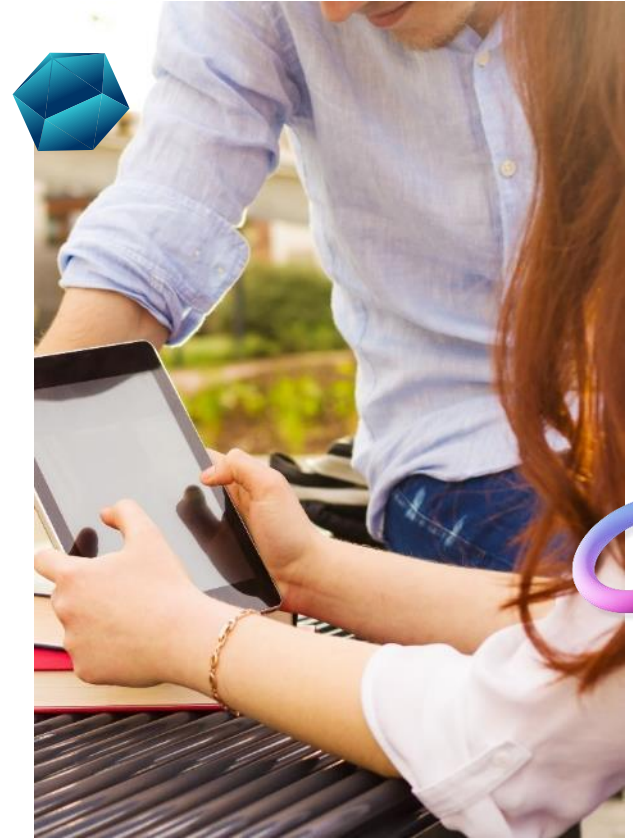
# Why is it Useful for Data Review

- **Verify** fulfillment configurations act as you specified
- **Validate** that Fulfillment Rules, Terms of Use, and policies act as you need, and then test any changes



# How to Use the Fulfillment Configuration Utility

1. Identify your expected results
2. Search for a Patron in the **Patron identifier** field
3. Search for an item in the **Item barcode** field
4. Click the **OK** button
5. Review the information provided in the **Fulfillment Attributes** and **Terms of Use Policies** sections (Cont.)





Fulfillment Attributes	
Fulfillment Unit Name	<a href="#">Limited</a>
Fulfillment Unit Rule	<a href="#">7 Days Faculty Limited</a>
Terms Of Use Name	<a href="#">7 Days Faculty Limited</a>
Due date if the item would be loaned now	11/11/2019 23:59:00 CST

Return date	<input type="text" value="11/13/2019 24:00"/>	<input type="button" value="X"/>	<input type="button" value="Calendar"/>	<input type="button" value="Calculate Overdue Fine"/>	Overdue fine	<b>4.00 USD</b>
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- Select the **Fulfillment Unit Name** link to view and edit the item's fulfillment unit.
- Select the **Fulfillment Unit Rule** link to view and edit the item's fulfillment unit rule.
- Select the **Terms of Use Name** link to view and edit the item's Terms of Use.
- Review the **Due date** if the item would be loaned now.
- Add a **Return date** to review the calculated fines.

# Identify the Expected Results: Configuration Form

Please enter your policies below

1. Institutional Default Values						
Column1	Column2	Column3	Column4	Column5	Column6	Column7
			Circulatable?	Recallable?	Loan Length	Loan Period
			Y	N	16	Week
2. Institutional Policies & TOU						
Column1	Column2	Column3	Column4	Column5	Column6	Column7
Location Type	Patron Type	Item Exception Type	Circulatable?	Recallable?	Loan Length	Loan Period
General	Undergraduate Students		Y	N	4	Week
General	Graduate Students		Y	N	16	Week
General	Staff		Y	N	16	Week
General	Community		Y	N	4	Week
General	Faculty		Y	N	16	Week
	Undergraduate					

# Identify the Expected Results: Spreadsheet

Location Type	Patron Type	Item Exception Type	Circulatable	Loan Length	Loan Period	Fine Amount	Max Fine
General	Undergraduate Students		Y	4	Week	\$2.00	\$20.00
General	Graduate Students		Y	16	Week	\$2.00	\$20.00
General	Staff		Y	16	Week	\$2.00	\$20.00
General	Community		Y	4	Week	\$2.00	\$20.00
General	Faculty		Y	16	Week	\$2.00	\$20.00
Reserves	Undergraduate Students		Y	3	Hours	\$2.00	\$20.00
Reserves	Graduate Students		Y	3	Hours	\$2.00	\$20.00
Reserves	Staff		Y	3	Hours	\$2.00	\$20.00
Reserves	Community		Y	3	Hours	\$2.00	\$20.00
Reserves	Faculty		Y	3	Hours	\$2.00	\$20.00
Short Loan	Undergraduate Students		Y	4	Week	\$2.00	\$20.00

# Loan Example

Expected Results of 4 week loan, 1 day grace period, \$2.00 a day fine, \$20.00 max fine amount

**Fulfillment Attributes**

Fulfillment Unit Name: **General**

Fulfillment Unit Rule: **4 Week Undergraduate Students General**

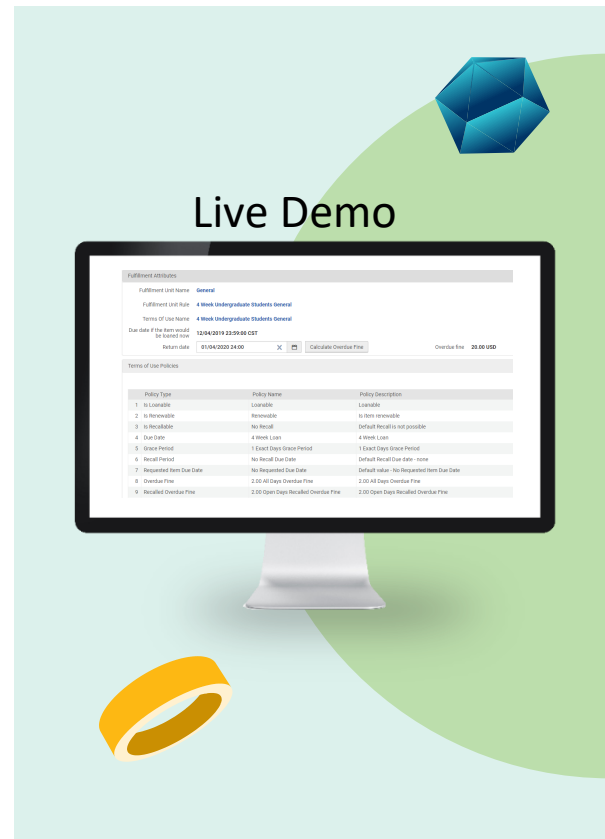
Terms Of Use Name: **4 Week Undergraduate Students General**

Due date if the item would be loaned now: **12/04/2019 23:59:00 CST**

Return date:     **Overdue fine 20.00 USD**

**Terms of Use Policies**

Policy Type	Policy Name	Policy Description
1 Is Loanable	Loanable	Loanable
2 Is Renewable	Renewable	Is item renewable
3 Is Recalable	No Recall	Default Recall is not possible
4 Due Date	4 Week Loan	4 Week Loan
5 Grace Period	1 Exact Days Grace Period	1 Exact Days Grace Period
6 Recall Period	No Recall Due Date	Default Recall Due date - none
7 Requested Item Due Date	No Requested Due Date	Default value - No Requested Item Due Date
8 Overdue Fine	2.00 All Days Overdue Fine	2.00 All Days Overdue Fine
9 Recalled Overdue Fine	2.00 Open Days Recalled Overdue Fine	2.00 Open Days Recalled Overdue Fine



# Request Example

Expected results of an item in the location type **Reserves** with the item exception policy of **3 Day** , for a patron type **undergraduate student** is not requestable

Loan Request Booking Overdue and Lost Loan Profiles

Alt + 1

Fulfillment Attributes

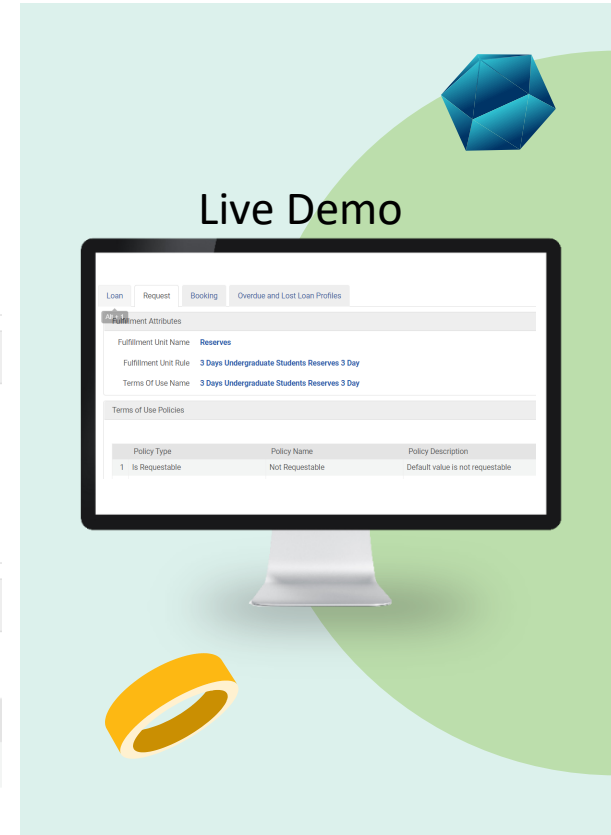
Fulfillment Unit Name **Reserves**

Fulfillment Unit Rule **3 Days Undergraduate Students Reserves 3 Day**

Terms Of Use Name **3 Days Undergraduate Students Reserves 3 Day**

Terms of Use Policies

Policy Type	Policy Name	Policy Description
1 Is Requestable	Not Requestable	Default value is not requestable



# Review of Fulfillment Configuration Utility

- **What:** the tool allows you to view fulfillment configuration information for a specific item if it were to be loaned to a specified user
- **Who:** Alma users with certain roles
- **Why:** helps you verify and validate your fulfillment configurations, TOUs, and fulfillment policies
- **How:** review the Fulfillment Attributes results to verify that they match what you expect to see.



Questions?

# Additional Resources

- [Viewing Fulfillment Configuration Information](#)
- [Physical Fulfillment](#)
- [Circulation Policies Configuration](#)
- [CARLI Office: Introduction to Fulfillment \(Circulation\) settings for test load configuration](#)



