

Alma Essentials: Fulfillment - Administration

Training Materials

- [Administration Fundamentals](#)
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Hands-on Exercises

Roles needed for these exercises: Fulfillment Administrator

Using your sandbox, **sign in as AlmaAdmin** (or any account with the **Fulfillment Administrator** role) and complete the following exercises. For these exercises, you may choose to either use the initial prompt to complete the activity on your own, or if you prefer, follow the step-by-step instructions.

Exercise #1: Add a new due date policy

1. Go to **Alma Configuration** and ensure you are configuring your institution.
2. Go to **Fulfillment > Physical Fulfillment > Advanced Policy Configuration**.
3. Click **Add Fulfillment Policy**.
4. Choose **Due Date** policy and click **Next**.
5. Enter a **Policy Name** and **Description** (if desired). Set the **Value Type** to **Non Fixed** (variable due date based on checkout date). Define the **Value** and **Unit of Measurement** accordingly.
6. Click **Save**.

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.

Exercise #2: Add a new Terms of Use (TOU) that uses the due date policy defined above

1. In **Alma Configuration**, ensure you are configuring your institution, and then go to **Fulfillment > Physical Fulfillment > Terms of Use and Policies**.
2. Click **Add a Terms of Use**
3. Choose Terms of Use type: **Loan** and click **Next**.
4. Enter a **Name** and confirm the following policies:
 - a. **Is Loanable** = Loanable (Loanable)
 - b. **Due Date** = Policy name you entered in Exercise #9
5. Select any other policies as desired and click **Save**.

Exercise #3: Add the new TOU to a Fulfillment Unit

1. In **Alma Configuration**, ensure you are configuring your institution, and then go to **Fulfillment > Physical Fulfillment > Fulfillment Units**.
2. Click on the **General** Fulfillment Unit.
3. On the **Fulfillment Unit Rules** tab, make sure the Rule Type is set to **Loan**, then click **Add Rule**.
4. Enter a **Name** that will help identify the TOU's purpose.
5. For **Input Parameters**:
 - a. Click **Add Parameter**.
 - b. Choose the **Name** of the parameter that will be used, such as **User Group**.
 - c. Choose the **Operator**, such as = (equals).
 - d. Choose the **Value**, such as **Undergraduate Student**.
 - e. Click **Add Parameter**.
6. For **Output Parameters**:
 - a. Choose the **Terms of Use** you created in Exercise #10.
7. **Save** the Rule.
8. Move this rule to the top of the list by utilizing the arrows in the **Move Up** column.
9. **Save** the Fulfillment Unit.