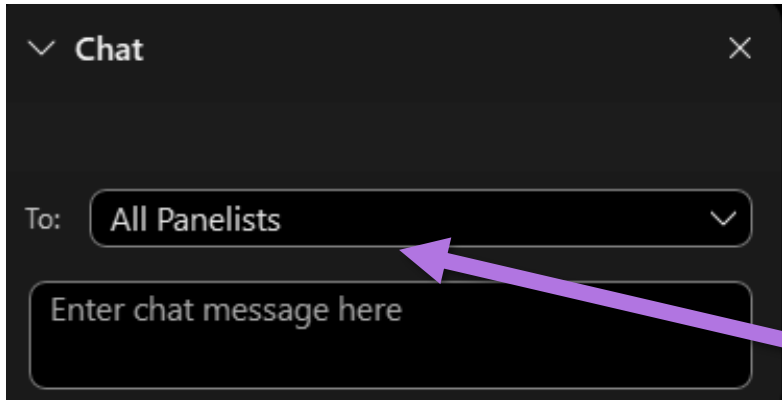


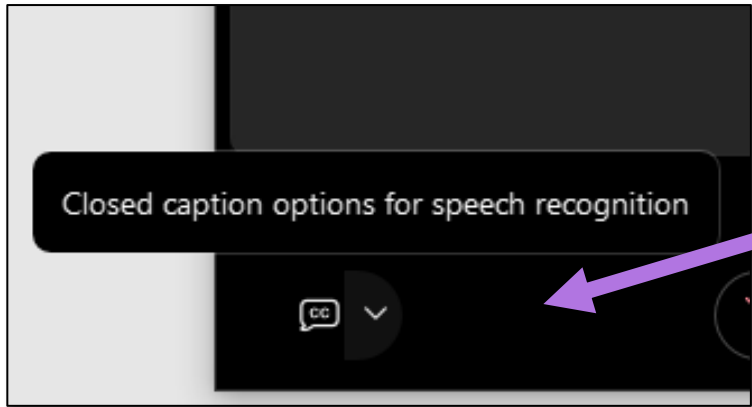
Automated Fulfillment Networks

February 2025

A few points about WebEx



- Technical issues? Exit and rejoin the WebEx session
- This session is being recorded
- Submit questions via WebEx Chat: Select **All Panelists** in the **To:** dropdown menu
- Turn captions on and off in the lower-left corner of the WebEx screen



Training-Series Session Topics

Session	Topic	Date
1	Resource Sharing Fundamentals	Feb. 11/12
2	Peer-to-Peer Resource Sharing	Feb. 18/19
3	Automated Fulfillment Networks	Feb. 25/26
4	Broker-based (NCIP) Resource Sharing	Mar. 4/5

Agenda

- **Introduction**
- Network Configuration
- Sharing Users
- Fulfillment Attributes
- Resource Sharing (AFN)

What is a Fulfillment Network?

- Group of Alma institutions that provide reciprocal fulfillment services to patrons at other institutions in the network
- Patrons can search the network members' collections to request resources
- Requested items can be circulated at any institution in the network

Fulfillment Network

Your Institution



Borrowing Patron

Partner A



Borrowing Patron -
Linked Account

Partner B

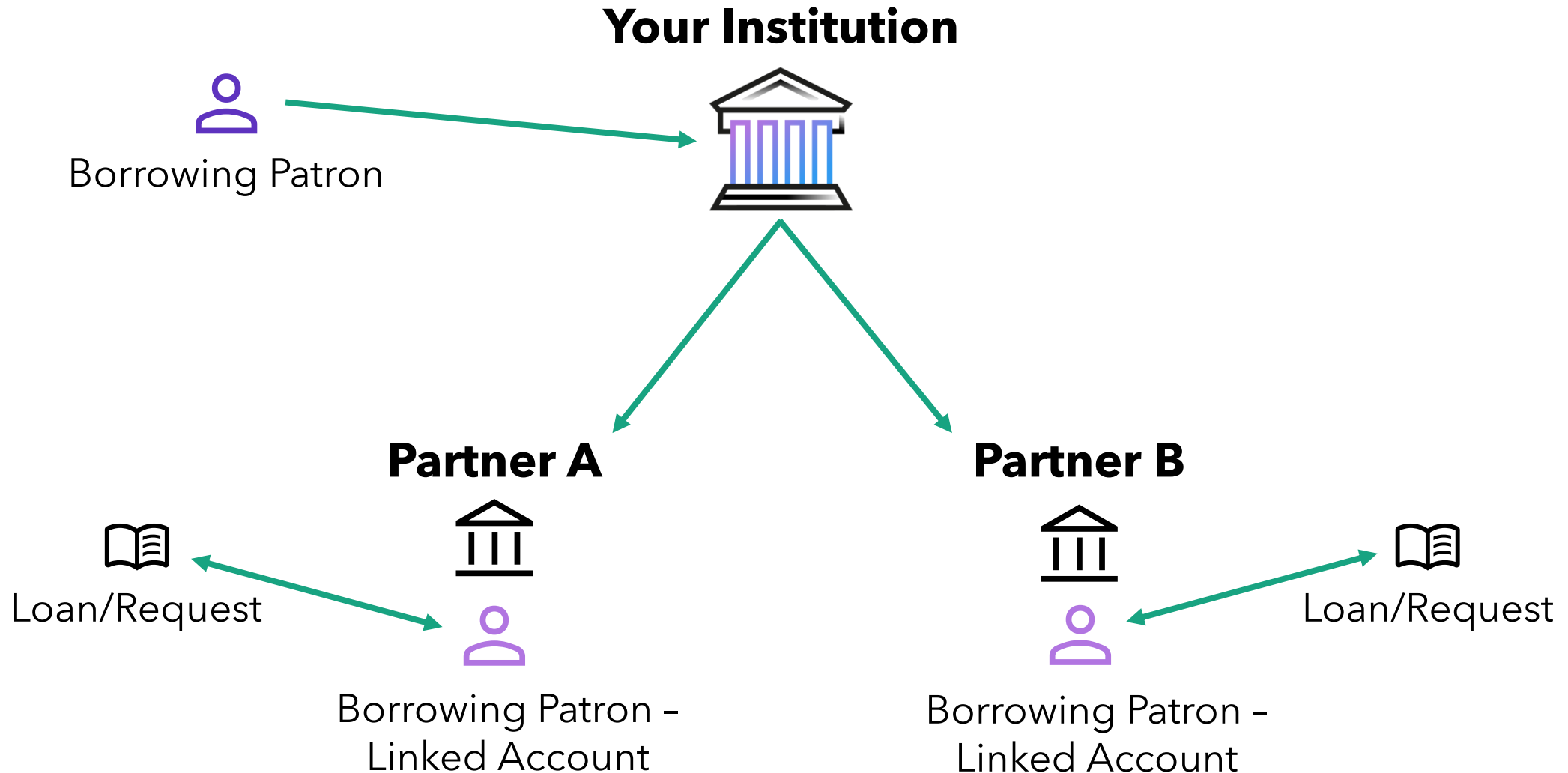


Borrowing Patron -
Linked Account

 Loan/Request

Loan/Request 

Automated Fulfillment Network



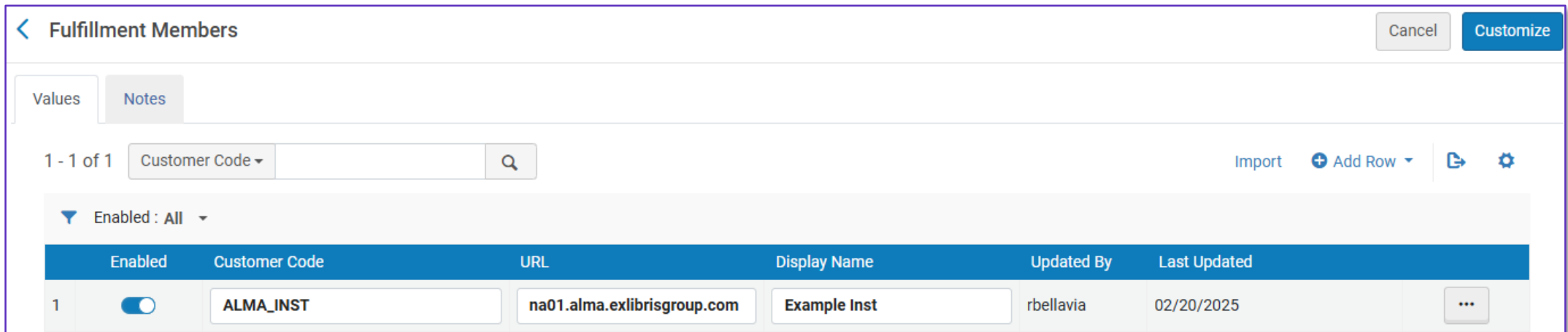
Agenda

- Introduction
- **Network Configuration**
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Configuring Fulfillment Members - Standalone Institutions

 **If your institution is in a Network, you do **not** need to do this.**

- Used to set up which other institutions you will share fulfillment network services with
- Institutions must also share a **networkSearchPassword** parameter



1 - 1 of 1

Customer Code

Import + Add Row

Enabled: All

Enabled	Customer Code	URL	Display Name	Updated By	Last Updated
<input checked="" type="checkbox"/>	ALMA_INST	na01.alma.exlibrisgroup.com	Example Inst	rbellavia	02/20/2025

Configuration > General > Network Groups > Fulfillment Member

Fulfillment Network Groups - Network Zones

- Configured in the Network Zone
- Define which institutions are part of a fulfillment network
- All members may be part of a single fulfillment network group, or you might have multiple smaller groups within the NZ

	Name	All	
1 - 2 of 2			
	Member	Type	
1	TRAINING_MEMBER2_CLEAN	INSTITUTION	...
2	TRAINING_MEMBER1_CLEAN	INSTITUTION	...

Configuration > General > Network Groups > Fulfillment Network Groups

Agenda

- Introduction
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Sharing Users

- Sharing users between institutions enables fulfillment activities throughout the network
- User record is maintained by the primary institution, while a linked account is created at partner institutions

The screenshot displays a user profile for Shirley, Anne. The profile includes a name field, an information icon, and a dropdown arrow. Below the name is a table of user details:

ID	ashirley	Account Type	External	Identity Service	Not Used
Record type	Public	User group	Consortium Member	Owner	TRAINING_MEMBE...

Below the table is a navigation bar with tabs: General Information, Contact Information, Identifiers, Notes, Blocks, Fines/Fees, Statistics, Attachments, Proxy For, and History. The 'Notes' tab is currently selected. Below the navigation bar is a dropdown menu showing 'Not local'. At the bottom of the profile, there is a table with the following information:

Institution	Network - Member 1	Linking ID	211769410000502
--------------------	--------------------	-------------------	-----------------

Linked Account Rules

- Linked account rules determine how accounts will be copied **to** your institution
- Configure options like selecting a User Group
- A common workflow is creating and assigning a User Group specifically for fulfillment network patrons

Input Parameters

+ Add Parameter

Name	Operator	Value
1 Source Institution	In List	Network - Member 1

Output Parameters

User Group * Consortium Member

Configuration > User Management > Collaborative Networks > Linked Account Rules

Other Linked Account Options

- Restricted User Groups
 - Configure certain user groups to be hidden from other institutions in a fulfillment network (e.g., Alumni, Guests)
- Linked Account Shared Fields
 - Control which user attributes are shared with other institutions when a linked user is created
- Searchable User Identifiers
 - Define which identifiers are searchable by other institutions, so that only patrons with that ID type receive fulfillment network services

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Institutions Relations

- Define whether an institution can **deliver to** and **circulate for** another institution
- Configured in the Network Zone


	From	To	Circulate For	Deliver To	Note	
1	Network - Member 2	Network - Member 1	✓	✓	-	...
2	Network - Member 1	Network - Member 2	✓	✓	-	...

Configuration > General > Network Groups > Institutions Relations

Library Configuration


- Checkbox: Serves Other Institutions
- Enables the library to process items from other institutions


General Details


Organization unit name * 


ISIL Code


Base URL -

Description 

Premium sandboxes: 

Default location for acquisition 

Campus 

Proxy 

Time to reshelve (hours)

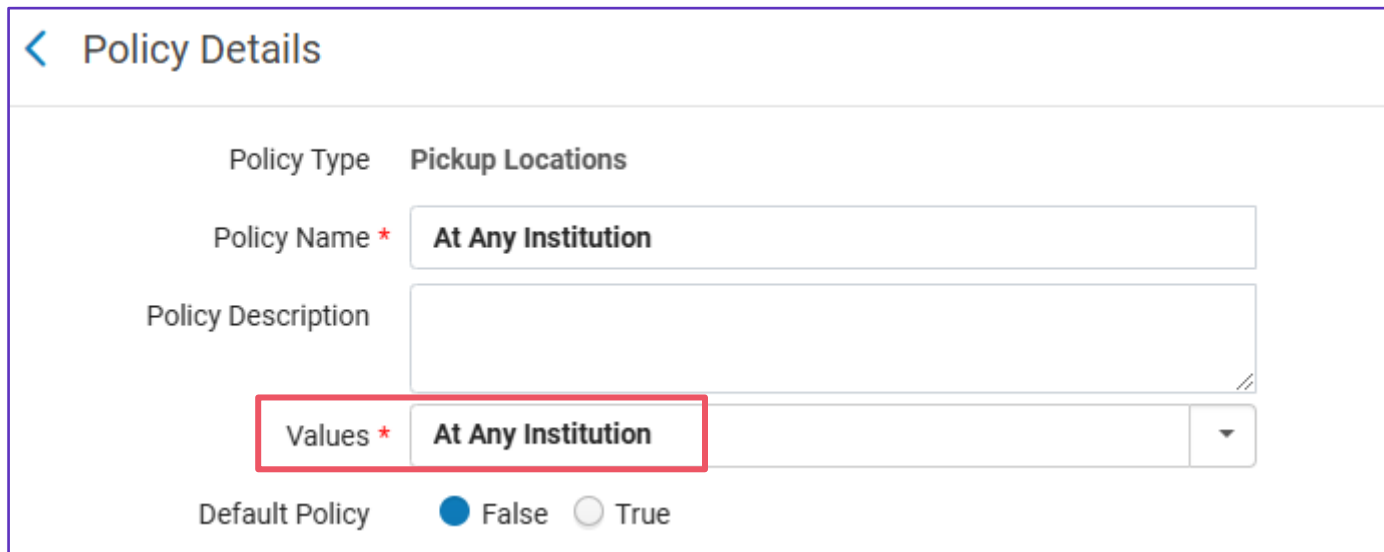
Delay for hold notification (minutes)

Allow other libraries to handle personal delivery

Serves Other Institutions

Pickup Anywhere - Requesting Configuration

- Enable patrons to place requests on items and select a different institution as the pickup location
- Policy: Pickup Locations = At Any Institution
- Add this Policy to any Terms of Use you want to apply to items that should be requestable for pickup at other institutions



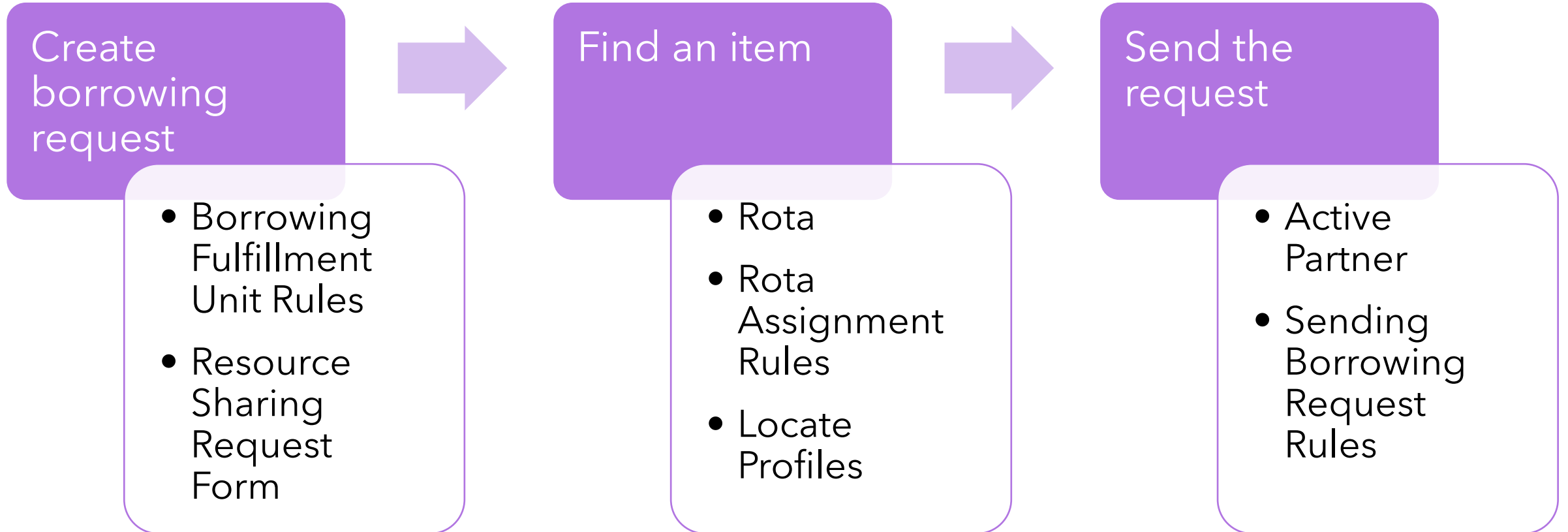
The screenshot shows a 'Policy Details' form with the following fields and options:

- Policy Type:** Pickup Locations
- Policy Name ***: At Any Institution
- Policy Description:** (Empty text area)
- Values ***: At Any Institution (This field is highlighted with a red box)
- Default Policy:** False True

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Borrowing Workflow



Partner Configuration: General Information

General Information | Contact Information | Parameters | Notes | Attachments

Code * **MEMBER2** Name * **Network Member 2**

Profile Type * **Fulfillment Network** Status **Active**

System Type * **Alma**

Average Supply Time **0** Delivery Delay (days) **0**

Currency

Alternate Symbol

Locate Profile **MEMBER2 - Locate Member2** Institution Code **TRAINING_MEMBER2_CLEAN**

Holdings Code

Supports Borrowing Borrowing Workflow **BORROW1**

Supports Lending

New Request Alert

How to search the partner's catalog

AFN partners are only used for Borrowing

Fulfillment > Resource Sharing > Partners

Partner Configuration: Parameters

General Information | Contact Information | **Parameters** | Notes | Attachments

Customer code *

Request Expiry No expiry Expire by interest date Expiry time

URL

Institution code for the Fulfillment Network partner

Alma domain for the Fulfillment Network partner

Fulfillment > Resource Sharing > Partners

Rota Templates

- Rota = List of Resource Sharing partners
- Each rota can include one or many partners
- Partners must be added to one and only one template
- Templates can be ordered or non-ordered

Fulfillment > Resource Sharing > Rota Templates

Rota Assignment Rules

- Used to assign rotas to borrowing requests
- Configure input parameters
- Define a rota as output
- Rules are followed in order and rotas are added sequentially if conditions are met

*Configuration > Fulfillment > Resource Sharing >
Rota Assignment Rules*

Sending Borrowing Request Rules

- Indicate when a borrowing request should be sent to the partner automatically
- Configure input parameters
- Define as output whether the request should be sent

*Configuration > Fulfillment > Resource Sharing >
Sending Borrowing Request Rules*

Workflow Profiles - Automated Fulfillment Network

- Only borrowing workflow profiles are relevant for Fulfillment Network partners
- Determine actions that can be performed on borrowing requests
- Many borrowing workflow options will not be relevant
- Key options: enable cancelling by patrons/staff

Configuration > Fulfillment > Resource Sharing > Workflow Profiles

Locate Profiles - Automated Fulfillment Network

- Determines how Alma searches the fulfillment network partner's catalog
- Uses Z39.50, so partner must have a Z39.50 Integration Profile configured
- When request is placed from a shared search, resource is located using the internal identifier
- Possible to enable locating by metadata for requests placed not in the shared search
 - Default: LCCN, System Control Number, ISBN/ISSN, Title
- Can also check item availability and requestability

Configuration > Fulfillment > Resource Sharing > Locate Profiles

Requestability in an Automated Fulfillment Network

- Requestability is determined by the “is requestable” policy
- Set a default user group for calculating policies during the fulfillment network locate process:
 - default_user_group_for_fulfillment_network_locate
 - Configured in the Lending institution

	parameter key	parameter module	parameter value	free text description
1	default_user_group_for_fulfillment_network_locate	fulfillment	CONSORTIUM	Default user_group that will be used

Configuration > Fulfillment > General > Other Settings



Additional Resources

Documentation and Training

- [How to Setup and Test a Fulfillment Network and an Automated Fulfillment Network](#)
- [Configuring Fulfillment Networks](#)
- [Linking Users in Collaborative Networks](#)
- [Fulfillment Networks](#)
- [Automated Fulfillment Network Requests](#)

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Thank You!

Please fill out the survey that will appear
when you close the WebEx meeting

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