
Distributing Fulfillment Information from the Network Zone

- **Product:** Alma
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Question

How do I configure Alma to distribute fulfillment policies from the network zone to institution zones?

Answer

Network Zone

1. Create **user groups** for **each type of user** in **every institution zone** (e.g. Institution 1 Faculty Group, Institution 2 Faculty Group, etc.): **Configuration > User Management > User Groups**

User groups will be needed in order to create fulfillment unit rules.

2. Create **fulfillment unit(s)** to distribute to the institutions. Only create fulfillment units that you intend to distribute to all institutions: **Configuration > Fulfillment > Physical Fulfillment > Fulfillment Units > Add Fulfillment Unit**

Give fulfillment unit(s) unique names and codes so that network zone fulfillment units are distinguishable within the institution zone.

3. Create all **fulfillment policies** needed for the terms of use for fulfillment unit(s)—including those related to **Loans** (due date, closed date management, overdue fine, etc.) and **Requests** (pickup location, etc.) Create booking policies if applicable for this fulfillment unit: **Configuration > Fulfillment > Physical Fulfillment > Advanced Policy Configuration > Add New Policy**
4. Create all **Loan** and **Request terms of use** needed for the fulfillment unit(s): **Configuration > Fulfillment > Physical Fulfillment > Terms of Use and Policies > Add a Terms of Use**
5. Create **fulfillment unit(s) rules**: **Configuration > Fulfillment > Fulfillment Units > [Shared Fulfillment Unit] > Edit > Fulfillment Unit Rules**
6. Run **Distribute Network Fulfillment Changes to Members** job: **Admin > Scheduled Jobs > Distribute Network Fulfillment Changes to Members > Run**

NOTE: ExLibris will need to run this job on your behalf during Test Load. After Go Live, the job can be scheduled to run on a regular basis.

Institution Zone

1. **Edit the existing fulfillment** unit that you would like to apply the shared fulfillment unit/TOU to: **Configuration > Fulfillment > Physical Fulfillment > Fulfillment Units > Edit**

2. Within the fulfillment unit, under **Rules from Network Fulfillment Unit**: Select the Shared Fulfillment Unit. Check mark **Use Network Rules First**: if you want the Network rules to be applied first.
3. Click **Save** to save the fulfillment unit.

Additional Documentation

- [Configuring Fulfillment](#)
- [Configuring Fulfillment Information in the Network Zone](#)

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