
How to Set Up Requesting Policies

Like loans and booking – the request options in Alma are determined by the fulfillment unit the item's location belongs to. You can set up request rules according to item / patron criteria and apply request terms of use accordingly.

You can see which fulfillment unit, request rule and terms of use (TOU) apply to a specific item for a specific patron in [Fulfillment > Advanced Tools > Fulfillment Configuration Utility](#).

Note

Administrators can also use this tool to edit the request rules and/or terms of use if needed.

In this how-to document, we will

1. Set the relations between libraries. This determines where a library allows its inventory to be sent to for pickup.
2. Review minimal "Terms of Use" (TOU) for requesting. Minimally, the TOU determines the following for each item that is managed by this TOU:
 - Whether the item can be requested.
 - Whether the item can be requested for personal delivery.
 - Where the item can be requested for pickup.
 - Other policies such as hold shelf period.
3. Review request policies that are managed at the Fulfillment Unit (and not at the TOU).
4. See how configurations can be verified

How to Set Up Relationships Between Libraries

Items for which the pickup policy determines that they may be picked up 'Anywhere' can actually be requested for pickup in any library that the item's owner allows delivery to. Libraries, therefore have to define where they allow their items to be delivered to. This may be determined by delivery policies as well as by logistic constraints (such as not delivering items to remote libraries).

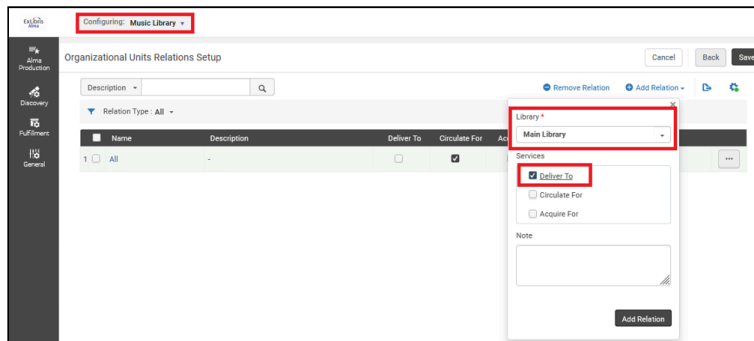
A library can check-in and check-out only items of other libraries which have been explicitly defined as allowed. This section will describe how these relationships are defined.

Setting Up Which Libraries a Library Can Deliver To:

1. Set up library relationships to determine allowed pickup options for physical items:
 - a. In Alma, go to [Configuration > General > Libraries > Relationships](#). In the configuration menu, set **Configuring** to the owning library you want to configure.
 - b. Click **Add Relation** and select **Deliver To**. This will add a relationship with any libraries that serve as a possible pickup location for the owning library.

Note

If all libraries in the institution are possible pickup locations, select library=All.

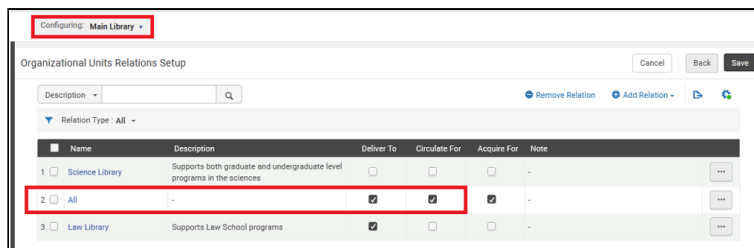


Add Relationship - Deliver To

Setting up items of which libraries a library can check out:

- Change “Configuring” to the pickup library you’ve configured and create a “Circulate For” relationship for the owning library.

In this example, the Main Library circulates the Music Library’s items since it is set up to circulate for all libraries except Science and Law.



Add Relationship - Circulate For

How to Set Up Request Terms of Use (TOU)

- Create Terms of Use (TOU) for **Requestable** and **Not-requestable** items:
 - In Alma, change “**Configuring**” to be the institution, then go to **Configuration > Fulfillment > Physical Fulfillment > Terms of Use and Policies**.
 - Click **Add a Terms of Use** and select **Request** from the terms of use type. Click **Next**.

The “**Not Requestable**” TOU we configure will have:

- The “Is Requestable” policy set to **Not Requestable**, to prevent patron physical item requests.
- The “Is Digitizable” policy set to **Not Digitizable**, to prevent patron digitization requests.

Terms of Use Management

Terms of Use Details

Name * Not Requestable

Description

Terms of Use Policies

| Policy Type | Policy Name | |
|---------------------|--|-----|
| 1 Is Requestable | Not Requestable (Default value is not requestable) | ... |
| 2 Pickup Locations | Anywhere (Default value for Pickup - Anywhere) | ... |
| 3 Hold Shelf Period | 10 days hold shelf period (item will remain on the hold shelf for) | ... |
| 4 Is Digitizable | Not Digitizable (Not Digitizable) | ... |

Terms of Use Management - Not-requestable

Policy Details

You are configuring: Training Integration

Policy Type Is Requestable

Policy Name * Not Requestable

Policy Description Default value is not requestable

Value * False True

Default Policy False True

Policy Details - Not Requestable

Policy Details

Policy Type Is Digitizable

Name * Not Digitizable

Policy Description Not Digitizable

Value True False

Default Policy False True

Policy Details - Not Digitizable

A basic **“Requestable”** TOU configuration will have:

- The “Is Requestable” policy set to “Requestable” to allow patron physical item requests.
- The “Is Digitizable” policy set to “Is digitizable” to allow patron digitization requests.
- The “Personal delivery” policy determines whether delivery to patron’s home or office address will be allowed. It should be set to “Home”, “Office” or “All” if your institution supports mailing requested items to a patron.
- The “Hold shelf period” determines how long an item will remain on the hold shelf if not picked up by the requester. After this period of time, it will be re-shelved or be made available to another requestor.

Note

This policy is also affected by the hold shelf period that is defined in the circulation desk configuration. The lesser of the two will be used by the system.

if a policy desired value does not already exist, it is possible to add a new supported policy value from the policy's row actions. For example, the Pickup Locations policy has a closed set of possibilities to select from to determine the possible pickup locations for an item, from owning library only to any library in the institution/network that the owning library has the required relationships:

Policy Details - Pickup Locations

Other policies, such as Hold Shelf Period, will allow entering a value, thus if we want the hold shelf period to be 10 days and our institution didn't configure this yet:

Hold Shelf Period

Policy Details - Hold Shelf Period

Once you've set up all the request policies to match your workflows, click **Next**, review the TOUs and save them:

| Policy Type | Policy Name | |
|--|---|-----|
| 1 Is Requestable | Requestable (Requestable) | ... |
| 2 Pickup Locations | Pickup only in owning library (Must pickup in owning library) | ... |
| 3 Hold Shelf Period | 7 day Hold Shelf (Default value for HoldShelfPeriod) | ... |
| 4 Is Digitizable | Is Digitizable (Default value for digitizable) | ... |
| 5 Is Requestable for Physical Resource Sharing | Requestable for physical resource sharing (Requestable for pi | ... |
| 6 Is Requestable for Digital Resource Sharing | Requestable for digital resource sharing (Requestable for digi | ... |
| 7 Request Priority | Medium (Medium) | ... |
| 8 On Shelf Request Policy | Use fulfillment unit definition | ... |
| 9 Personal delivery | Personal Delivery - Home (Deliver items only to a home addre | ... |
| 10 Personal delivery fee | Personal Delivery Fee - No Fee (Personal delivery is not charg | ... |
| 11 Automatically convert to resource sharing | Convert to resource sharing (Convert to resource sharing) | ... |
| 12 Digitization Fee per Digitization | No Fee (Digitization request is not charged with a fee) | ... |
| 13 Digitization Fee per Page | No Fee (Digitization request is not charged with a fee per page | ... |

Terms of Management - Review TOUs

Fulfillment Unit Effects on Requests

The Fulfillment Unit has the following effects of the request policies:

- The fulfillment unit rules determine which TOU will be in effect for a requesting patron and a requested item.
- The policy, with regard to whether on-shelf items will be requestable, is determined in the Fulfillment Unit configuration.

Setting the Request Rules:

1. To add a fulfillment unit (or edit an existing fulfillment unit that is used for the item's location):
 - a. In Alma, go to **Configuration > Fulfillment > Physical Fulfillment > Fulfillment Units**.
Enter Code and Name and select whether to allow requests on items that are currently available on the shelf:

+ Add Fulfillment Unit ▾

Code *

new

Name *

New Books

Description

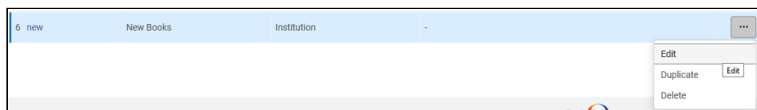
On Shelf Request Policy *

Request for pickup anywhere regard ▾

Add Fulfillment Unit

Add Fulfillment Unit

2. Edit the relevant fulfillment unit to add/edit fulfillment rules that will apply to the new TOU.

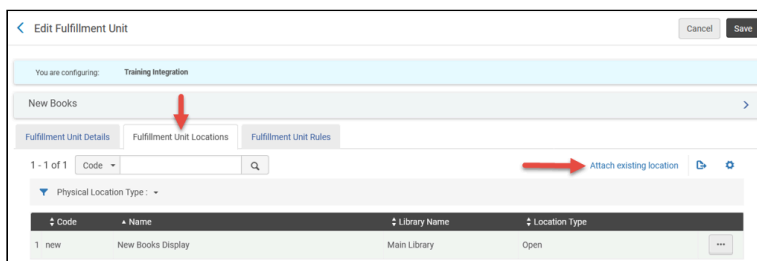


Edit Fulfillment Unit

Verify that the item's location is attached to the fulfillment unit.

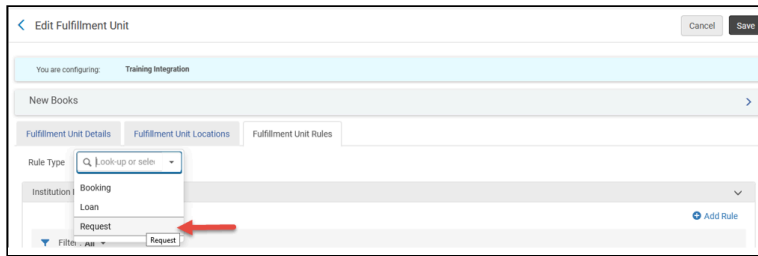
Note

A location can only be attached to one fulfillment unit.



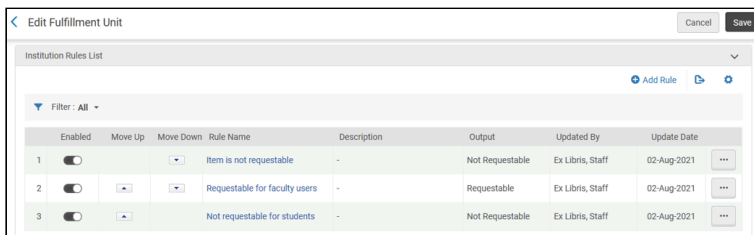
Edit Fulfillment Unit - Item's Location

3. Navigate to the Fulfillment Unit Rules tab and select **Request** from the Rule Type drop-down.



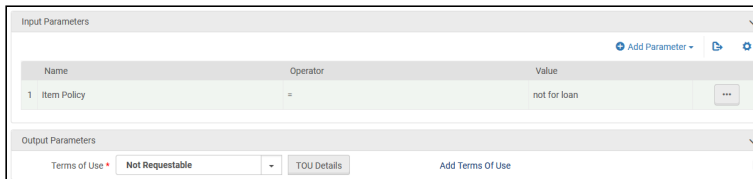
Fulfillment Unit Rules Tab

- a. Add rules that determine in which scenarios the items in these locations are requestable. The rules are applied hierarchically (the first rule from the top that matches the scenario decides the behavior). If no rule matched the item and patron (or no rule is defined), the default rule applies. In our example, we will add 3 rules:



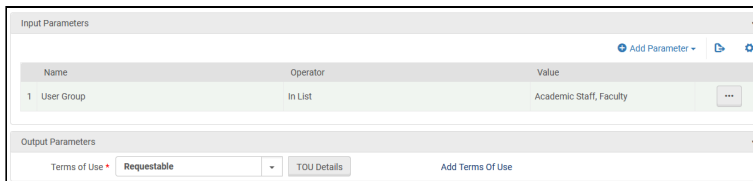
Edit Fulfillment Units - Institutions Rules List

- i. Items that are not for loan and are never requestable – by item policy:



Input Parameters

- ii. Items are requestable for faculty patrons (except for items with “not for loan” item policy, caught by the rule above:



Input Parameters

- iii. Items are not requestable for student patrons:

