
Fulfillment Library Independence

Note

This page describes Fulfillment Library Independence including how the implementation impacts the stakeholders (patrons, circulation desk staff, etc.).

For links to all the main fulfillment documentation pages see [Fulfillment](#).

See also the [Jan. 18th Webinar Recording](#)

Fulfillment Library Independence supports better separation of fulfillment activities between multiple libraries that are grouped in an Alma institution, for instance:

- **Small Universities or other organizations that are grouped into a single Alma institution**

This may happen for considerations that have to do with the libraries' size and ability to maintain a full-scale Alma institution. Being independent libraries, small libraries' workflows and configurations should be as separate as possible from other libraries. This is especially true with regard to fulfillment workflows where patrons' privacy is affected in an undesirable manner by having fulfillment data shared with other libraries grouped into the same Alma institution. On the other hand, being a small library with minimal staff, maintaining a full-size Alma institution for every library is a burden.

- **Independent colleges that are part of a single institution**

While the institution may have shared configurations, workflows, and data that make the recommended Alma topology be a single Alma institution, it may be made up of historically independent colleges. For example, these colleges may be managing the same funds and purchasing scheme but are totally independent when it comes to their teaching and therefore the fulfillment aspects of their workflows.

- **Institutions that are organized as independent campuses**

Similar to the multiple colleges use case, an institution may be made up of multiple campuses that may be very remote from one another. This simple geographic consideration makes their teaching and therefore their fulfillment workflows and policies independent from one another.

In all these use cases above, maintaining a single Alma institution but still enabling greater independence of the libraries correctly balances the requirement for a single Alma institution with the need of the libraries to maintain their independence.

The Fulfillment Library Independence enables separating fulfillment activities in one of two models:

1. **The Full Fulfillment Independence Model**

This model restricts fulfillment data access at the highest degree, enabling access to patrons' fulfillment activity only to staff with roles in the owning library of the resource. For example, in this model circulation desk operators at a library have access to patrons' loans information only if the loaned item belongs to the circulation desk operator's scoped library.

2. **The Partial Fulfillment Independence Model**

This model balances the patrons' privacy with giving them the best service experience. It is similar to the Full model in

all aspects, except that it gives more liberal access to the pickup library's staff, as they are the ones who are in direct contact with the patron and need access to the relevant fulfillment data in order to provide better services. For example, in this model circulation desk operators at a library have access to patrons' loans information not only for loans of items that belong to the circulation desk operator's scoped library, but also to loans that are picked up at the circulation desk operator's scoped library.

Setting up the required model of library separation is done by Ex Libris. Please contact [Ex Libris support](#) to activate a desired model.

The following sections detail how implementing either model affects the different stakeholders in Fulfillment.

Patrons

Patron authorization and service eligibility are based on the patron role and the fulfillment rules. Both elements are manageable at the library level, for instance:

- Patron roles may be assigned at a specific library. In that case, the patrons are allowed to request and borrow only items that are owned by the library in which they have a patron role.
- Patron registration at a circulation desk may be done in a way that creates a patron role only for the library where the registration is taking place ('**Currently At**' location of the desk). This is achieved by setting **User Registration Rules** that determine the assigned patron role to be done at the scope of a library (and not the institution). It is also possible to assign separate registration fees for each library. Registering patrons in specific libraries (and activating the relevant registration rules) is also possible using the **Create Users API**.

It is possible to limit the ability to search for user accounts, so that logged in users will be able to search only for accounts that have patron role that is scoped to a library that the library operator's roles are scoped to. Setting this option is done by using the User Management configuration menu>General>Other Settings menu to set the `limit_user_search_by_library_scope` parameter to true.

Circulation Desk Staff

Implementing either of the Fulfillment Independence Models limits the circulation desk staff's access to fulfillment related activities.

Circulation desk operators are able to renew patron roles only for libraries that are in their enabled scope. For general information on circulation desks see [Managing Patron Services at a Circulation Desk](#).

Patron Notifications

When working in either one of the Fulfillment Independence Models, both institution-level user attachments and library-level user attachments are supported. When a notification is sent to a patron, an attachment on the user record is created according to the notification owner, for example; a loan receipt is owned by the pickup library, an overdue notification is owned by the item's owning library, and a general notification to the user is owned by the institution.

Note

It is recommended to activate the `separate_patron_notifications_by_library` customer parameter when working in a Fulfillment Independence Model, so that aggregated fulfillment notifications are grouped by library and not across the institution.

Before activating this parameter there are important considerations that are described in the documentation for

the [separate_patron_notifications_by_library](#) parameter (**Configuration Menu > Fulfillment > General > Other Settings**).

See also [Configuring the institution/Library Contact Information](#).

Library-specific patron letters/emails can have a specific **Reply to** address. This enables patrons to reply back to the appropriate library.

Below are letters that are affected by this feature.

Letter Types and Owning Libraries

| Letter | Owning Library |
|---|-------------------|
| Fine Fee Payment Receipt Letter | Circulation desk |
| Borrowed By Letter | Pickup location |
| Ful Cancel Request Letter | Owning library |
| Document Delivery Notification Letter | Owning library |
| Ful Digitization Notification Item Letter | Owning library |
| Ful Fines\Fees Notification Letter | Fee owner library |
| Loan Status Notice | Owning library |
| Loan Receipt Letter | Pickup library |
| Ful Lost Loan Letter | Owning library |
| Ful Lost Loan Notification Letter | Owning library |
| Ful Lost Refund Fee Loan Letter | Owning library |
| On Hold Shelf Reminder Letter | Owning library |

| Letter | Owning Library |
|---|----------------|
| Ful Overdue And Lost Loan Letter | Owning library |
| Ful Overdue And Lost Loan Notification Letter | Owning library |
| Ful Personal Delivery Letter | Pickup library |
| On Hold Shelf Letter | Owning library |
| Ful Requests Report Letter | Owning library |
| Return Receipt Letter | Pickup library |
| Shortened Due Date Letter | Pickup library |
| Short loan Letter | Pickup Library |
| Courtesy Letter | Owning library |
| Automatic Loans Renewal Letter | Owning library |
| Overdue Notice Letter | Owning library |
| Borrowing Activity Letter | Owning library |

Request Operators

Request operators, like circulation desk staff, are assigned library level roles and have access only to the circulation desks that a given library has authorized them. The pick from shelf tasks that these operators have access to is limited to those that are managed by the library in which they have been granted a role.

When working in either of the Fulfillment Independence Models, the **Requests Monitor** is filtered by library ownership. The considerations determining an **active** request's ownership are the same as for the circulation desk operator. In instances of **non-active** requests, such as completed or cancelled requests:

- In the Full Fulfillment Independence Model, requests are only visible to request operators with a relevant role at the owning library of the item that fulfilled the request (for completed requests) or that may have fulfilled the request at the time of cancellation (for cancelled requests).

- In the Partial Fulfillment Independence Model, requests are visible to request operators with a relevant role at the owning library of the item that fulfilled the request (for completed request) or that may have fulfilled the request at the time of cancellation (for cancelled requests), or the requested pickup library.
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Note

Only patron requests are affected by the operator's role scope.

User Managers

User Managers with roles that are at the scope of a library have access only to loans, returns, requests, blocks, notes, fees, statistical categories and notifications of their scoped library or libraries. The considerations for what they are enabled to view are as for circulation desk operators. User Managers with roles that are at the scope of the institution are accessible to all of the patron's activities, regardless of the library ownership.

Fulfillment Administrators

It is possible to limit users with a Fulfillment Administrator role to manage only specific libraries. Limited administrators are able to access and update only configurations that affect their scoped library.

- **Loans** - Desk operators will see patron loans only if the loaned items are enabled as per the operator's role scope and the selected model:
 - In the Full Fulfillment Independence Model, active loans are only visible to operators with a circulation role at the item's owning library.

An operator at a pickup library only sees loans performed in the current session. Any further actions on the loan (such as renewal) require contacting the owning library.
 - In addition to the viewable loans when using the Full Fulfillment Independence Model, in the Partial Fulfillment Independence Model the operator also views loans that were checked out at a library that the operator is enabled to view.
 - **Returns** – As for loans, Desk operators see patron loans only if the loaned items are enabled as per the operator's role scope and the selected model (i.e. only loans of items owned by the operator's library, or also those returned at the operator's library).
 - **Requests** - Desk operators see patron requests only if the operator's role scope is one of:
 - A library that owns an item that may fulfill the request. When a request is itemized, this limits only the selected item's owning library.
 - The pickup library selected in the request.
 - The managing library of the request at any given time. For example, if an item is in transit from a specific library in order to fulfill a request, that library's operator is able to see the request in order to handle it until it is received in the pickup library.
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Note

- Only *patron* requests are affected by the operator's role scope. Thus, for example, Work Order requests or Transit for Reshelving requests from outside the operator's scope are still visible to the operator.
 - In the Full Fulfillment Independence Model, requests are only visible to request operators with a relevant role at the owning library of the item that fulfilled the request (for completed requests) or that may have fulfilled the
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request at the time of cancellation (for cancelled requests) or the requested pickup library (for active requests).

- In the Partial Fulfillment Independence Model, requests are visible to request operators with a relevant role at the owning library of the item that fulfilled the request (for completed requests) or that may have fulfilled the request at the time of cancellation (for cancelled requests), or the requested pickup library.

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- **Fees** - Desk Operators see a balance of only fees that are owned by a library that is in their enabled scope (or owned by the institution). Likewise, they are able to process (receive payments for or waive) only fees that are owned by a library that is in their enabled scope (or owned by the institution).
 - **Blocks** - It is possible to create blocks that are owned by a given library. Desk operators are able to view and manage only blocks that are owned by a library that is in their enabled scope (or owned by the institution).

Note

Library level blocks affect only loans of items of the same library.

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- **Notes** - It is possible to create notes that are owned by a given library. Desk operators are able to view and manage only notes that are owned by a library that is in their enabled scope (or owned by the institution).
 - **Statistical Categories** - It is possible to create user statistical categories that are owned by a given library. Desk operators are able to view and manage only statistical categories that are owned by a library that is in their enabled scope (or owned by the institution).

Note

Where statistical categories have been used as input to fulfillment rules they affect only loans and requests of items of the same library

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- **Notifications** - Desk operators are able to view only notices that are sent by a library that is in their enabled scope (or sent by the institution).
 - Institution attachments are visible to all operators with access to user attachments.
 - Library attachments are visible to operators with a role in the library that owns the attachment.