

# Fulfillment and Resource Sharing

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## Fulfillment and Resource Sharing

### Overview

Alma Fulfillment and Resource Sharing features allow patrons to quickly and easily access resources in all formats, utilizing library-managed resources as well as resources the library can obtain from external sources.

### Roadmap

2026 H1	2026 H2	2027 H1
<ul style="list-style-type: none"> <li>• <a href="#">Override Hold Policies by Staff</a></li> <li>• <a href="#">Request Policy for "Last Interest Period"</a></li> <li>• <a href="#">Prevent Requests When Loans are Blocked</a></li> <li>• <a href="#">User Management: Enhanced User List Sorting by First, Middle, and Last Name</a></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Enhanced Booking Experience and Management</a></li> <li>• <a href="#">Alert when Changing Due Date of Recalled Loan</a></li> <li>• <a href="#">Proxy Loan Navigation Improvements</a></li> <li>• <a href="#">User Management: Expiration Date for Proxy Relationships</a></li> <li>• <a href="#">Query to Patron Responses</a></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Loan Period Sensitive Courtesy and Overdue Notices for Short Loans</a></li> <li>• <a href="#">Persistent Role Template</a></li> <li>• <a href="#">View Digitized Content in My Account</a></li> </ul>

### 2026 H1

#### Override Hold Policies by Staff



Idea Exchange

What's New	Highlights	Impact
An option for staff to override policy-related blocks that prevent placing hold requests.	A button on the Alma request form will enable staff to override requestability/limit hold policies. Clicking the button will enable submitting the request while overlooking the preventing policy.	More flexibility in handling requests by having the option to override a situation where the request is not possible because of request policies.

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## Request Policy for "Last Interest Period"



### Idea Exchange

What's New	Highlights	Impact
In addition to being able to set the "Not Needed After" field as mandatory on the request form, it will also be possible to set a default policy for this field.	It will be possible to hide the "Not Needed After" field from the Primo VE request form and have Alma use a date that is set by a library policy.	Improved efficiency for request queues. The library can set highly requested items to have short expiration dates so they do not get sent to the hold shelf if time passes until they can be fulfilled.

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## Prevent Requests When Loans are Blocked



### Idea Exchange

What's New	Highlights	Impact
An option to set the system to block requesting items that have loan policies or a block that prevents loaning the item.	A configurable parameter will support setting the system to check the patron's permissions to loan. If the patron cannot loan the item, requesting will also not be allowed.	Improved request service for library patrons by being unable to request items they are currently blocked from loaning.

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## User Management: Enhanced User List Sorting by First, Middle, and Last Name

What's New	Highlights	Impact
The user list will be enhanced to be sorted by first, last, and middle names, accommodating specific regional requirements where the last name, for example, is common for many users.	<ul style="list-style-type: none"> <li>New Sorting Options: The Find and Manage Users interface will get three new columns: First Name, Last Name, and Middle Name.</li> <li>Customizable Display: Users can select and sort these new</li> </ul>	This enhancement will allow for more flexible and region-specific sorting of user lists, improving usability and meeting the needs of diverse user bases.

What's New	Highlights	Impact
	columns in ascending or descending order.	

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## 2026 H2

### Enhanced Booking Experience and Management

What's New	Highlights	Impact
Booking functionality will be enhanced with features that will improve both the end user experience and the library booking workflow management tools, focusing on space booking use cases.	<ul style="list-style-type: none"> <li>Improved calendar for requesting.</li> <li>Repeatable bookings support.</li> <li>Support for grouping multiple items in one request.</li> </ul>	The new tools will enable patrons who use Primo and Alma for space booking to enjoy more efficient and intuitive request interfaces that better reflect their space booking requirements.

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### Alert When Changing Due Date of Recalled Loan



#### Idea Exchange

What's New	Highlights	Impact
An option to configure a warning that pops up when the Change Due Date is used on a recalled loan.	It will be possible to set the system to warn if a due date for a recalled item is changed at the circulation desk.	Better loan service clarity by preventing manual change of due dates for already recalled items.

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## Proxy Loan Navigation Improvements

What's New	Highlights	Impact
Improvements with using a proxy patron account in Manage Patron Services.	It will be possible to easily identify a proxy patron at the circulation desk and choose the sponsor on whose behalf an item is checked out.	Improved efficiency of proxy-patron management at the circulation desk.

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## User Management: Expiration Date for Proxy Relationships



### Idea Exchange

What's New	Highlights	Impact
Proxy relationships between patron accounts will get an expiration date, ensuring they automatically expire after a set period.	<ul style="list-style-type: none"> <li>Expiration Date Field: An expiration date field will be added to the Proxies tab in the user form and API.</li> <li>Automatic Expiry: Proxy relationships will be considered inactive and ignored by the system after the expiration date.</li> <li>Editable Expiry Date: This will allow editing of the expiration date directly in the Proxies tab.</li> </ul>	This enhancement enables academic institutions to manage proxy relationships more effectively by setting automatic expiration dates, ensuring permissions do not extend indefinitely and align with academic schedules.

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## Query to Patron Responses

What's New	Highlights	Impact
It will be possible to configure the Query to Patron message, allowing patron to submit responses to the query.	Configuring a link in the Query to Patron message will enable the patrons to link to the request information in Primo and to submit a response that the library staff will be able to view within the requests task list.	This enhancement turns one-way messaging into an interactive dialogue without requiring separate forms or surveys.

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## 2027 H1

## Loan Period Sensitive Courtesy and Overdue Notices for Short Loans



## Idea Exchange

What's New	Highlights	Impact
It will be possible to configure the courtesy and overdue reminders for short loans as a percentage of the loan period instead of in exact minutes.	It will be possible to set the courtesy and overdue message for short loans to be set by a percentage of the loan period. For example, a value of 50% would cause a two-hour loan to have an overdue message to be sent one hour after due time.	Courtesy and overdue messages for short loans will better match the specific loan's due time, resulting in clearer messages to the patrons.

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## Persistent Role Template

What's New	Highlights	Impact
It will be possible to configure role templates and attach them to users. All users linked to a template will automatically inherit its defined roles and scopes.	Libraries will be able to manage role groups by creating templates and assigning them to users.  Any later changes made to a template will cascade to all associated user accounts, ensuring consistency and reducing administrative overhead.	This feature introduces stronger role management control by enabling group-level authorization management, simplifying governance, and improving scalability across large user bases

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## View Digitized Content in My Account

What's New	Highlights	Impact
Patrons that received a digitized file for fulfilling a digitization request will be able to directly download it from Primo	Patrons will have access to digitized content not only through the email notification they receive, but also directly within their My Account tab in Primo.  The content will remain accessible for a library-configured duration, ensuring patrons can conveniently retrieve materials without relying solely on email links.	This improvement strengthens user experience by providing a persistent and centralized access point for digitized materials, reducing the risk of lost emails and enhancing overall service reliability.

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