



Fun with FN and AFN

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Agenda



- What is (A)FN
- Benefits and value
- Considerations**
- The moving parts
- Demos
- Stats
- Q&A
- (Configuration tips)

Fulfillment Network



FN

The resource may be returned anywhere

The patron directly requests the resource from the remote member institution.



The resource owning library is the patron's service provider.



Request

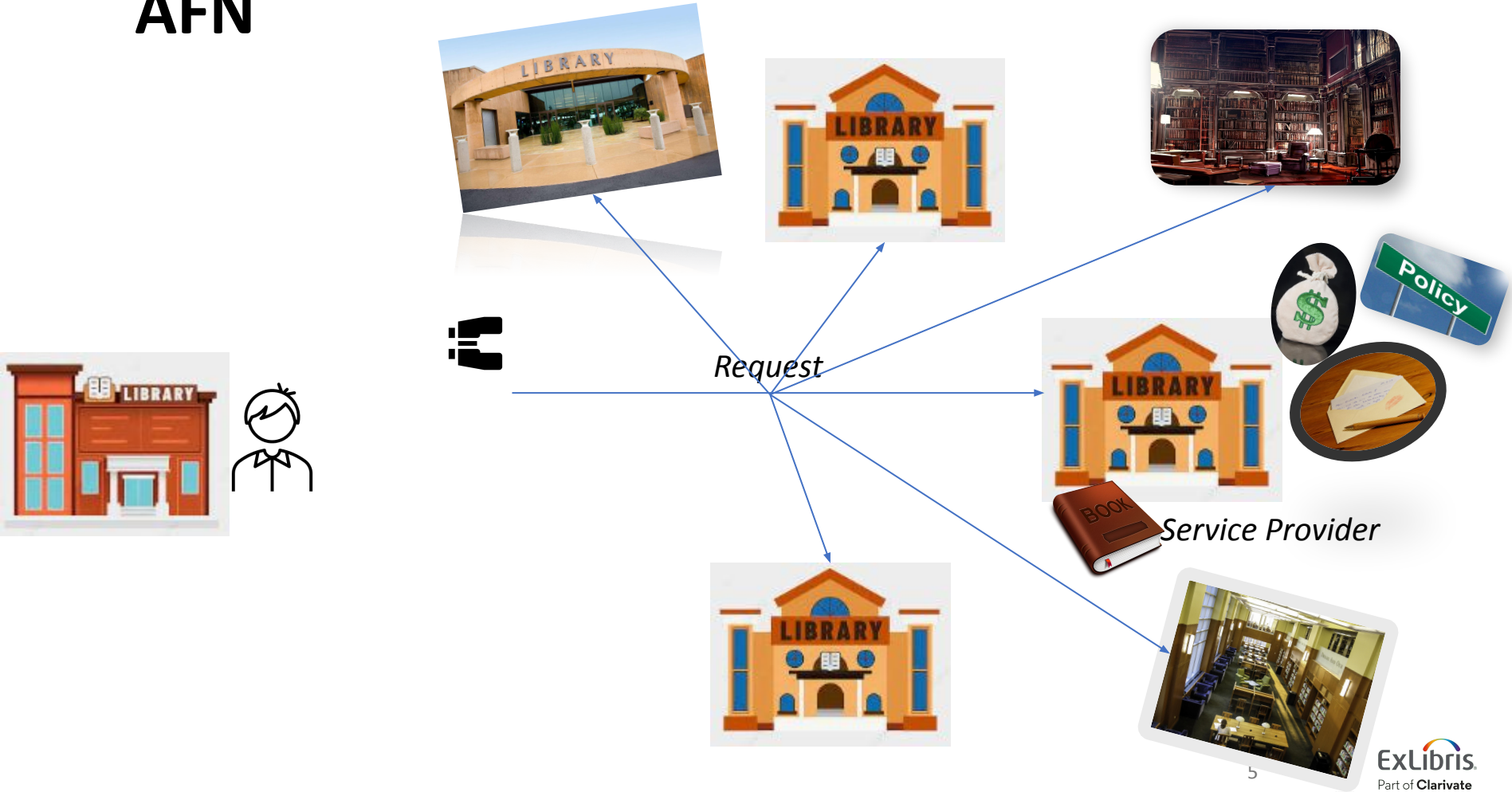


The resource may be picked up anywhere



The resource owning library directly manages all aspects of the loan cycle

AFN



Resource Sharing Network

- The patron's home institution is the patron's service provider.
- The patron's home institution staff uses its own availability information, priorities and workflow considerations
- The patron's home institution is accountable for the loaned item from the perspective of the resource owning library
- The home institution may activate a load balancing process to select the appropriate supplier
- The pickup location is always at the patron's home institution.

Fulfillment Network

- The resource owning library is the patron's service provider.
- The patron directly requests the resource from the remote member institution.
- The resource may be picked up anywhere
- The resource owning library directly manages all aspects of the loan cycle with the requesting patron, including
 - Loan management (overdue, lost, renew etc.)
 - Fine/fee related issues

Fulfillment Network – Library & User Value

- Libraries manage **only their own resources**
 - Patrons **directly track and manage** the request and loan – no intermediary
 - Transparency
 - Self serve
 - Direct contact with library
 - **Single workflow** and experience for libraries and patrons
-
- Walk in service
 - Pickup Anywhere
 - Return Anywhere

Fulfillment Network – Library & User Value

The Fulfillment Network -

- Lowers the **library involvement** in terms of configuration, maintenance of supplier lists and in terms of staff mediation of the requests.
- The responsibility for obtaining the resources **is on the end user**

The **Automated** Fulfillment Network -

- Lowers the **patron's involvement** in terms of finding and getting the item
- The responsibility for obtaining the resources **is on the library.**

- Libraries manage **only their own resources**
- Patrons **directly track and manage** the request and loan – no intermediary
 - Transparency
 - Self serve
 - Direct contact with library
- **Single workflow** and experience for libraries and patrons
 - Walk in service
 - Pickup Anywhere
 - Return Anywhere
 - ΠΙΣΤΟΠΟΙΗΜΕΝΟ
 - ΠΙΣΤΟΠΟΙΗΜΕΝΟ
 - ΑΝΑΓΝΩΣΤΕΡΙΑ

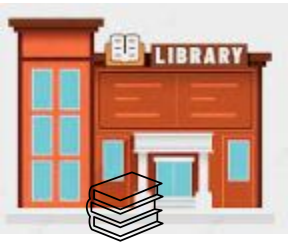
Fulfillment Network – Considerations

- Patron information may be **freely shared** between the institutions of the network, using any of the supported models
 - Linked accounts
 - Consortial ID
 - NZ managed users
- More information on users sharing is [on the CKC](#)
- Institutions should agree on the policies by which their resources will be checked out to different patron types of other institutions
- Shared discovery system



Basic Elements

Network



*User sharing
attributes*



Loan attributes

Request Attributes

Demo



Hybrid Rota

The screenshot shows the ExLibris library website. At the top, there is a dark blue navigation bar with the ExLibris logo on the left and a menu of options: LIBRARY SEARCH, JOURNAL SEARCH, COLLECTION DISCOVERY, ILL REQUEST, FETCH ITEM, BROWSE, and a three-dot menu. On the right side of the navigation bar, there are icons for a grid, a location pin, and the user name 'Mashe Shechter'. Below the navigation bar is a search bar with the placeholder text 'Search anything'. To the right of the search bar are a microphone icon and a magnifying glass icon, with the text 'ADVANCED SEARCH' below them. The main content area is light gray and contains two white boxes. The left box is titled 'How does this work?' and contains text about Primo and a bulleted list of features. The right box is titled 'Where can I get help?' and contains a link to ask a librarian. Below that is another box titled 'Questions? Comments?' with a link to provide feedback. In the bottom right corner, there is a small notification icon and a toolbar with a play button and a pencil icon.

ExLibris

LIBRARY SEARCH JOURNAL SEARCH COLLECTION DISCOVERY ILL REQUEST FETCH ITEM BROWSE ...

Mashe Shechter

Search anything

ADVANCED SEARCH

How does this work?

Primo provides simple, one-stop searching for books and e-books, videos, articles, digital media, and more.

Primo also helps you manage your research. Sign-in in order to:

- Renew books and videos
- Create favorites lists
- Export citations to Refworks and Endnote Web
- View full search results. (Some databases, only show results when you're signed in.)

Where can I get help?

[Ask a librarian how to start your search](#)

Questions? Comments?

[Let us know what you think!](#)

Manual FN

Search anything



ADVANCED SEARCH

How does this work?

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Questions? Comments?

[Let us know what you think!](#)

Full Process

The screenshot displays the ExLibris website interface. At the top left is the ExLibris logo. A dark blue navigation bar contains the following menu items: LIBRARY SEARCH, JOURNAL SEARCH, COLLECTION DISCOVERY, ILL REQUEST, FETCH ITEM, BROWSE, and a three-dot menu. On the right side of the navigation bar, there is a Primo logo, a location pin icon, and the user name Moshe Shechter with a dropdown arrow. Below the navigation bar is a white search bar with the placeholder text "Search anything". To the right of the search bar are a microphone icon, a magnifying glass icon, and the text "ADVANCED SEARCH".

The main content area features three help sections:

- How does this work?**

Primo provides simple, one-stop searching for books and e-books, videos, articles, digital media, and more.

Primo also helps you manage your research. Sign-in in order to:

 - Renew books and videos
 - Create favorites lists
 - Export citations to Refworks and Endnote Web
 - View full search results. (Some databases, only show results when you're signed in.)
- Where can I get help?**

Ask a librarian how to start your search
- Questions? Comments?**

Let us know what you think!

In the bottom right corner of the page, there is a blue circular icon containing a white exclamation mark.



Statistics

Some Stats

Fulfillment - Loans with and without patron linked from another institution - by regio

This report is showing cumulative data up to date as of May 2022

Region	Num. Loans with patron linked from another institution	Num. Loans with patron not linked from another institution	% Loans with patron linked from another institution
AP	20,261	62,110,851	0.03%
CA	32,131	6,718,783	0.48%
CN	0	5,466,574	0.00%
EU	205,033	169,399,719	0.12%
NA	204,144	138,333,139	0.15%
Grand Total	461,569	382,029,066	0.12%

Institution Type	Num. Loans with patron linked from another institution	N li
Member	408,422	
Network	0	
Standalone	53,147	
Grand Total	461,569	



Some Stats

Catalog Home Catalog Favorites Dashboards Create

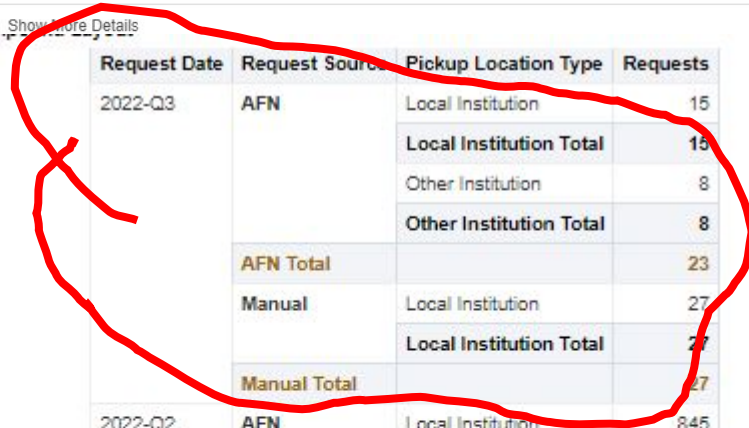
Location /Shared Folders/Community/Reports/Shared Reports/Reports/Fulfillment - Fulfillment Network

Folders: EBOOK Ce, Electronic, Exploro, Events, Fines and, Fulfillme

Type All Sort Name A-Z Show More Details

- Loans by guest patrons per library** Last M
This report retrieves information about locally owned
Open Edit More
- Local items loaned at another institution**
This report retrieves statistics about locally owned ite
Open Edit More

ate	Loans	Loans from Hold Request	Recalls	Renewals	Lost	Claimed
	20	20	0	0	0	
	20	20	0	0	0	
	985	861	0	0	4	
	985	861	0	0	4	
	1,544	1,466	1	0	49	
	1,544	1,466	1	0	49	
	1,342	1,208	0	0	43	
	1,342	1,208	0	0	43	



Request Date	Request Source	Pickup Location Type	Requests
2022-Q3	AFN	Local Institution	15
		Local Institution Total	15
		Other Institution	8
	Other Institution Total	8	
	AFN Total	23	
	Manual	Local Institution	27
Local Institution Total		27	
Manual Total		27	
2022-Q2	AFN	Local Institution	845
		Local Institution Total	845
		Other Institution	992
	Other Institution Total	992	
	AFN Total	1,837	
	Manual	Local Institution	8,250
Local Institution Total		8,250	
Other Institution		60	
Other Institution Total	60		
Manual Total	8,310		





Q&A

Q&A

- Q : Can fulfillment networks be set up only based on common NZ?
 - No. As long as both are Alma institutions (😊), they don't require to share NZ or a shared Primo
- Q : Can institutions use a FN when some are using Primo VE and some using Primo classic ?
 - Yes. My Account can retrieve information across Primo types. Some setup is required in the classic Primos. Direct request does depend on having the same system

Q&A

- Q : Can FN be set across multiple data centers ?
 - There are some optimizations to same instance partners, but it is not mandatory.

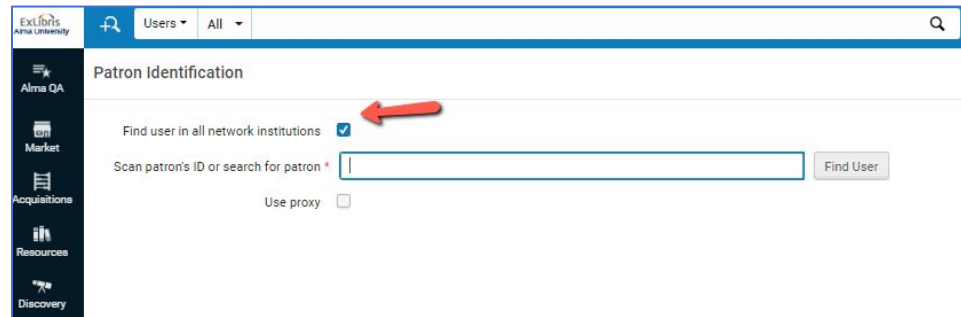
Q&A

- Q : Can blocks be shared across the network ?
 - Patron blocks can be defined as ‘consortial’. When such blocks are placed on a patron record in institution A, the patron account will be blocked also in institution B. Technically, the block is copied from institution A to B. The block will be removed from institution B when it is removed at institution A.
 - The above description works with explicit block records that are either manually or automatically (such as because of overdue loans) attached to a patron record. It does not work with calculated blocks, such as patron limits. These blocks are handled at each institution independently from the other.

Q&A

- Q : Can a consortially unique IDs be used at the circulation desk ?
 - network_users_unique_identifiers - FULL - Identifiers are unique across all members of the fulfillment network and are not duplicated.

In Manage Patron Services a ‘Find user in all network institutions’ check box will cause Alma to search for the ID first in the local institution and if not found then in all other participating institutions. Alma will automatically find the user record at any of the network institutions and pull its information from its institution.

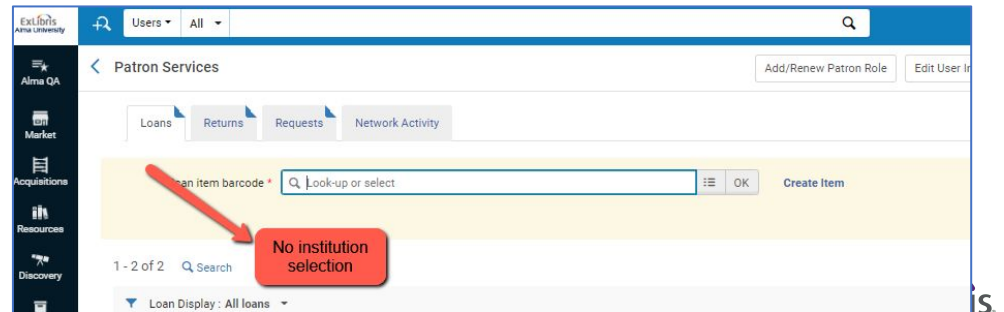


The screenshot shows the 'Patron Identification' section of the Alma interface. A red arrow points to the 'Find user in all network institutions' checkbox, which is checked. Below this is a search input field labeled 'Scan patron's ID or search for patron' and a 'Find User' button. There is also an unchecked 'Use proxy' checkbox.

Q&A

- Q : Can a consortially unique item barcodes be used at the circulation desk ?
 - fulfillment_network_unique_barcodes - FULL - Barcodes are unique across all members of the fulfillment network and are not duplicated.

The Item Owner drop-down list does not appear on the Manage Patron Services, Return Items, or Scan In pages. Alma searches for the barcode, first locally, then in all other institutions. The search completes as soon as the barcode is matched and processing continues automatically.



Q&A

- Q : How does patron authentication work in a Fulfillment Network ?
 - Linked accounts are not relevant for authentication purposes. Primo must always know which Alma IZ to direct the authentication process to, and that chosen institution must have the account already existent in its user management.
 - An exception to that is where NZ managed users exist and the login is SAML based. In that case the user account does not have to preexist in the institution.

behind the iron curtain



ExLibris University Consortium










All Libraries



ADVANCED SEARCH

 0 selected PAGE 1 92 Results Save query

Tweak your results

-  **BOOK**
Behind the iron curtain
Moorad, George
2013
[Check for available services >](#)
-  **BOOK**
Behind the iron curtain
Poddebski, Karol.; Belloc, Hilaire, 1870-1953, former owner.
1946
[Out of library >](#)
-  **BOOK**
Subversive Adaptations Czech Literature on Screen behind the Iron Curtain
Bubeníček, Petr. author.
2017
[Available Online >](#)
-  **BOOK**
Daily life behind the Iron Curtain
Willis, Jim, 1946 Mar. 19-2013
[Available Online >](#)
-  **BOOK**
Vatican II Behind the Iron Curtain
Kosicki, Piotr H., 1983- editor.
2016
[Available Online >](#)
-  **BOOK**
Behind the Iron Curtain; the Soviet satellite states: East European nationalisms and education
Rouček, Joseph S. (Joseph Slabey), 1902-1984.
1964
[Check for available services >](#)
-  **BOOK**
Red star over Poland, a report from behind the iron curtain
Kerstein, Edward S., 1911-1947
[Check for available services >](#)

Sort by Relevance ▾

Availability ▲

Available online

Held by library

Resource Type ▾

Subject ▾

Creation Date ▾

Author/Creator ▾

Library ▾

Other Libraries ▾

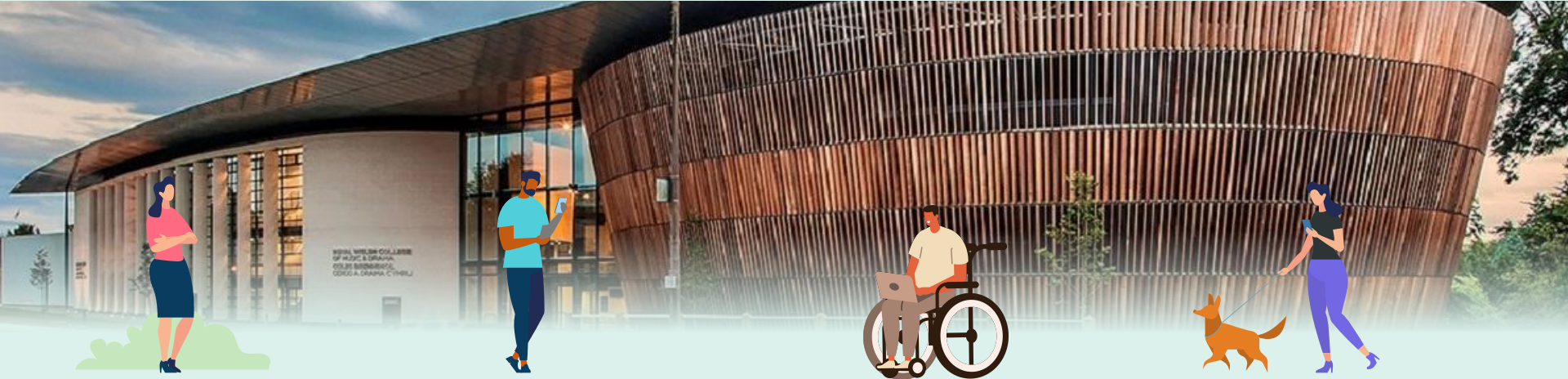
Location ▾

Institution ▾

Language ▾

Donor Note ▾

Local Institution field ▾



Thank you!

Moshe.shechter@clarivate.com





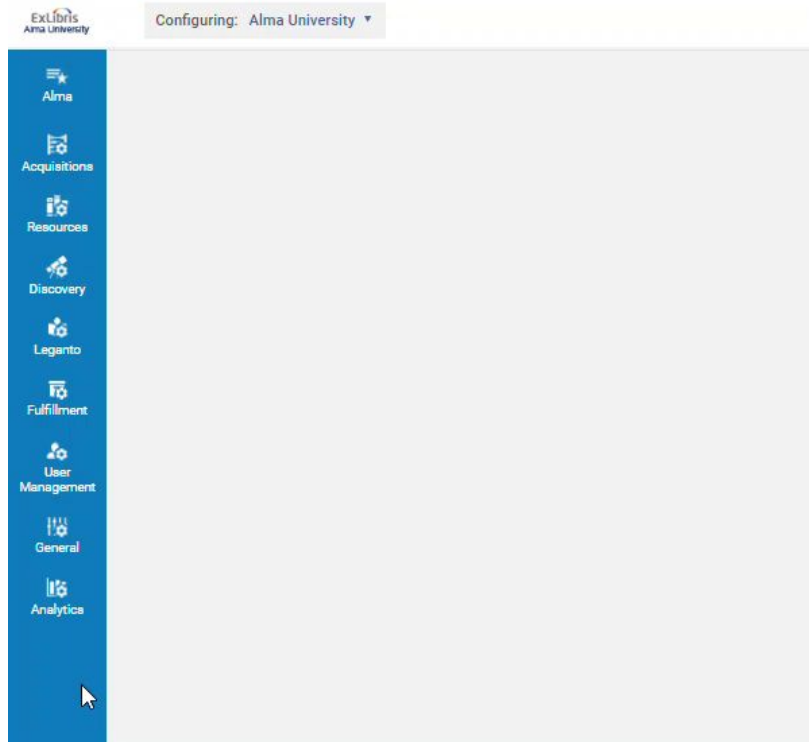
Configurations



The Network

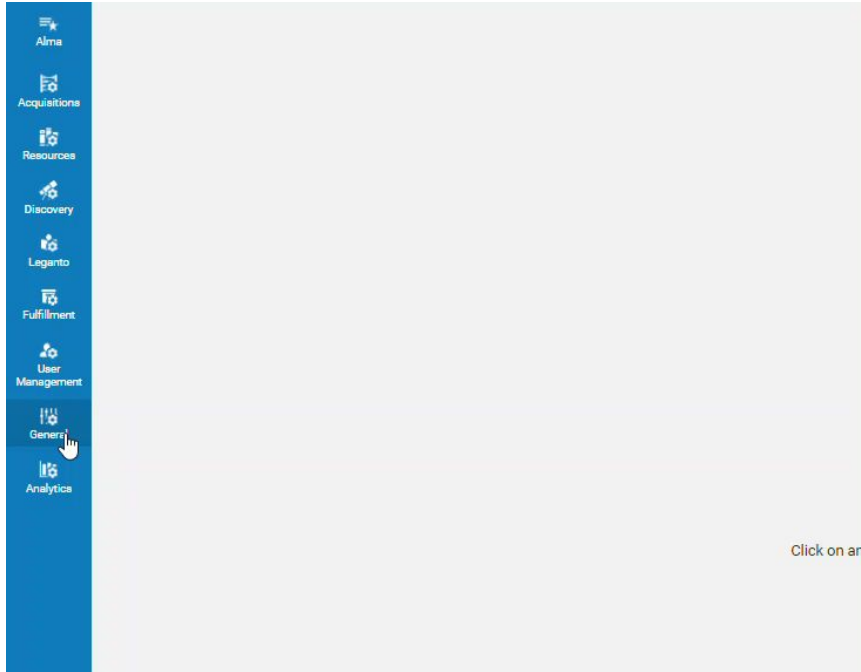
The Network

Shared password



The Network

Members (non NZ members)




The Network

Members (NZ members)

Ex Libris
members

Configuring: Ex Libris University Consortium ▾

- Alma
- Acquisitions
- Resources
- Discovery
- Leganto
- Fulfillment
- User Management
- General
- Analytics



Configuration dashboard

Click on any link from the configuration menu on the left to start working.

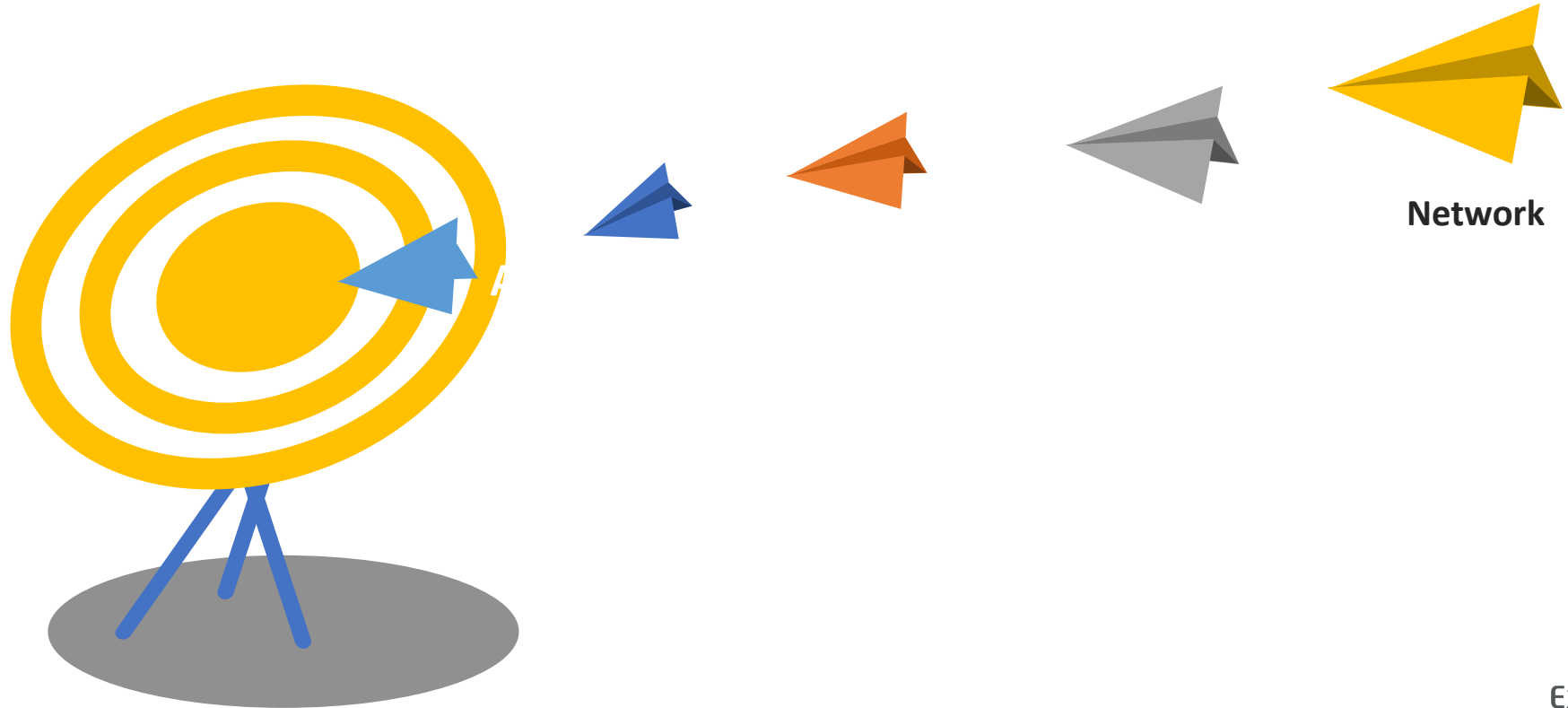
The Network

Testing the setup

The screenshot displays the Ex Libris Alma library management interface. On the left is a dark sidebar with navigation icons for Alma, Market, Acquisitions, Resources, Discovery, Fulfillment (highlighted), Admin, and Analytics. The top header is blue and contains the Ex Libris Alma Library logo, search filters for 'Physical Items' and 'Keywords', a home icon, a search icon, a shopping cart icon, and 'Main Libre Circulation'. The main content area shows a welcome message: 'Welcome, Ex Libris Staff' with the date '06/29/2022'. Below this is a breadcrumb trail: 'Recent Pages > Labels (Discovery) > Borrowing Requests (Fulfillment)'. A 'Notifications' panel is open, showing three items:

Date	Notification	Date
2018	We hope you enjoy your Alma experience	04/05/2018
2018	Go to Discoveralma.com to learn more about Alma	04/05/2018
2018	See and learn more about Ex Libris on YouTube	04/05/2018

Configuration Steps





The Shared Users

Linked Account Rules

How accounts are copied **to** your institution from another institution.

This configuration option maps the values of the linked account that is created in your institution.

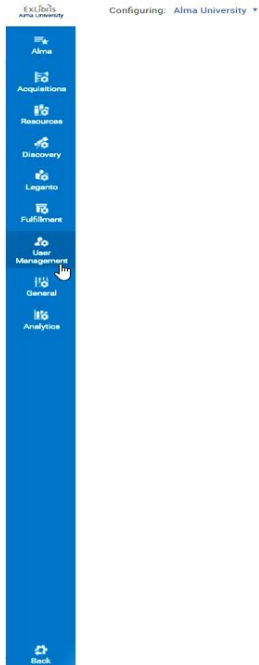


The screenshot shows the ExLibris Alma University configuration interface. On the left is a vertical blue navigation menu with the following items: Alma, Acquisitions, Resources, Discovery, Leganto, Fulfillment, User Management, General, Analytics, and a Back button at the bottom. The main content area is titled "Configuring: Alma University" and features a central illustration of a person pushing a large gear. Below the illustration, the text reads "Configuration dashboard" and "Click on any link from the configuration menu on the left to start working."

Linked Account Shared Fields

Control what fields from **your** patron records are copied over to **another** institution.

It enables you to protect the privacy of your patrons.



Configuring: Alma University

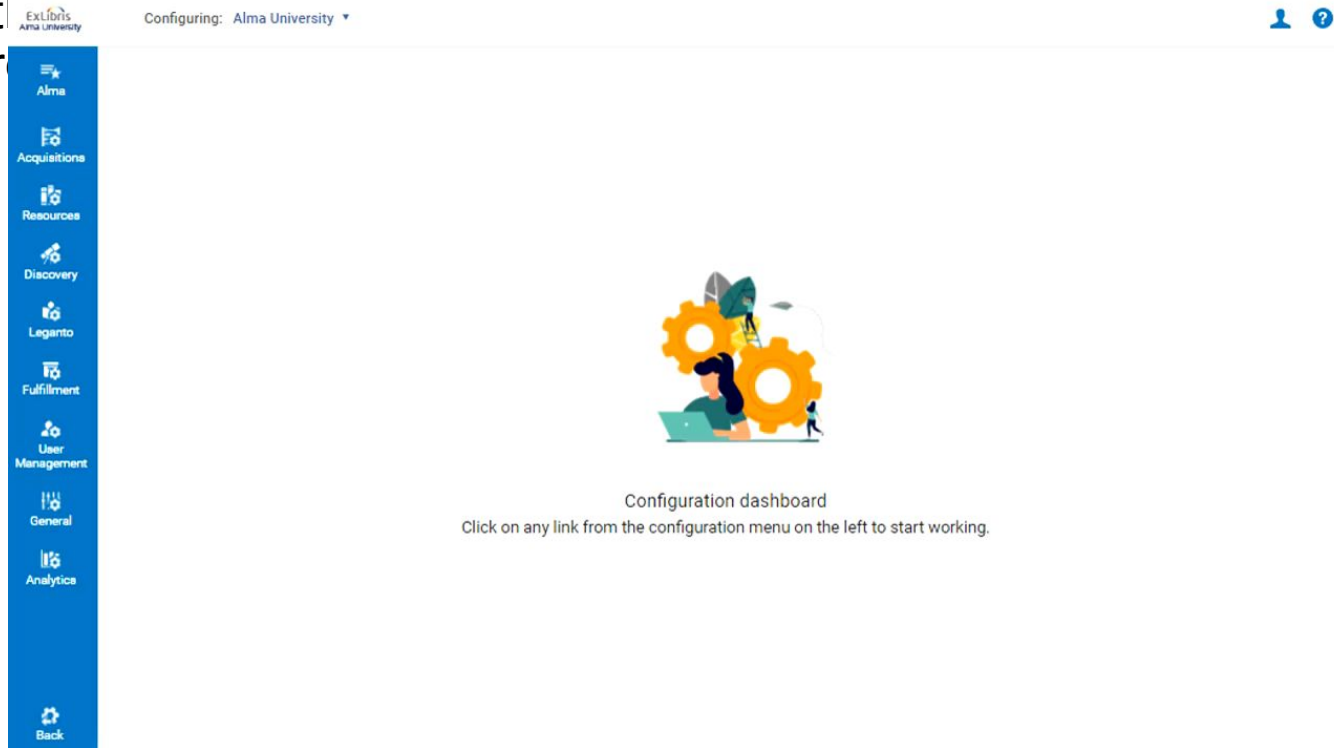


Configuration dashboard

Click on any link from the configuration menu on the left to start working.

Restricted Users

Determine which **of your** user groups are hidden from other institutions in a fulfillment network. Effectively,



ExLibris
Alma University

Configuring: Alma University

Alma

Acquisitions

Resources

Discovery

Leganto

Fulfillment

User Management

General

Analytics

Back

Configuration dashboard

Click on any link from the configuration menu on the left to start working.

Consortially Unique Identifiers

When patrons approach a desk in your library, there is no need to first select their source institution before scanning in their ID. By only scanning in their ID, Alma finds the correct record in whatever institution in the network and pulls the user record.

Patron Identification

Find user in other institution

Institution

Scan patron's ID or search for patron *

Use proxy

Find user in all network institutions

Scan patron's ID or search for patron *

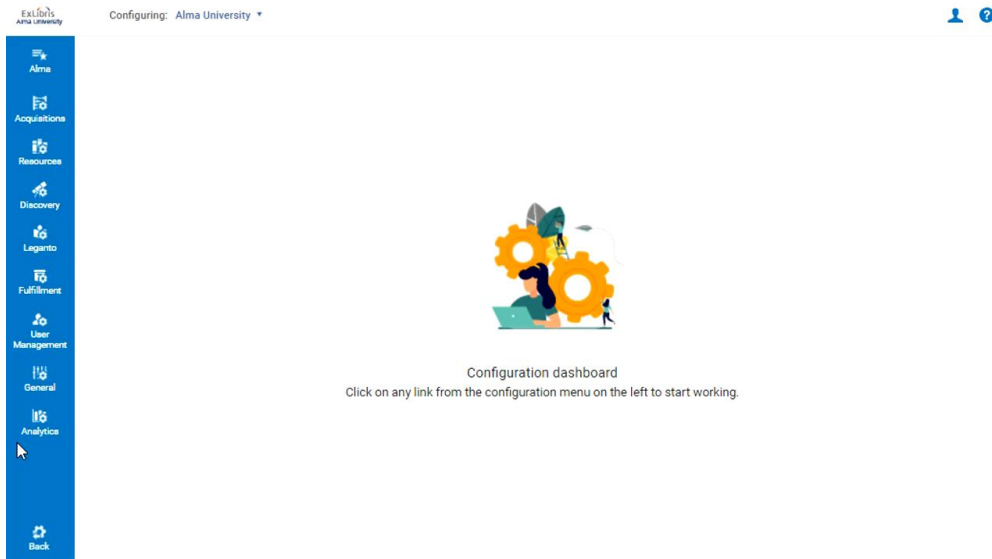
Use proxy

Find User

Searchable Identifiers

Only patrons that are granted the ID types configured in this table can get fulfillment network services, and only by using the IDs of the types configured here when identifying at the circulation desk of a remote library.

- A typical use case is where not all patrons are eligible for fulfillment network services



The screenshot shows the ExLibris Alma University configuration interface. At the top left, it says "EXLIBRIS Alma University" and "Configuring: Alma University". On the right, there are user and help icons. A blue sidebar on the left contains a navigation menu with the following items: Alma, Acquisitions, Resources, Discovery, Leganto, Fulfillment, User Management, General, Analytics, and Back. The main content area features a central illustration of a person working with large yellow gears and a satellite dish. Below the illustration, the text reads "Configuration dashboard" and "Click on any link from the configuration menu on the left to start working."

The Shared Users

Testing the setup

The screenshot shows the ExLibris Open Library interface for editing user details. The top navigation bar includes search filters for 'Physical titles' and 'Keywords', and the user is logged in as 'Central Library - Default Circulation Desk'. The left sidebar contains navigation icons for Alma QA, Acquisitions, Resources, Discovery, Fulfillment, Admin, and Analytics. The main content area is titled 'User Details' and features a 'Toggle Account Type' button, 'Cancel', and 'Save' buttons. The user information is organized into three sections: 'User Information', 'User Management Information', and 'User Roles'. The 'User Information' section contains fields for personal and professional details, while 'User Management Information' includes password and login restriction settings. The 'User Roles' section shows a list of roles with a '1 - 1 of 1' indicator and management actions like 'Add Role' and 'Remove Selected'. A right-hand sidebar displays the user's profile, including their name 'Lawson, Ellen', ID 'OU100', and record type 'Public', along with a 'Manage fulfillment activities' link.

ExLibris Open Library

Physical titles Keywords

Central Library - Default Circulation Desk

Alma QA

Acquisitions

Resources

Discovery

Fulfillment

Admin

Analytics

Show MDE

Configuration

User Details

Toggle Account Type Cancel Save

General Information Contact Information Identifiers Notes Blocks Fines/Fees Demerits Statistics Attachments Proxy For History

User Information

First name * Ellen

Last name * Lawson

Preferred middle name

Primary identifier * OU100

PIN number Generate

Job description

User group Please select a value

Website URL

Status Active

Birth date

Purge date

Purchase request library

Send message General mail Compose

Middle name

Preferred first name

Preferred last name

Title

Job category Please select a value

Gender

Campus

Preferred language English

Status date 28/10/2013

Expiration date

Resource sharing library

Selected Patron Letters

User Management Information

Password

Verify password

Force password change on next login

Disable all login restrictions

User Roles

1 - 1 of 1

Filter: All

Add Role Add from Profiles Remove Selected

Lawson, Ellen

ID OU100

Record type Public

Account Type Internal

User group -

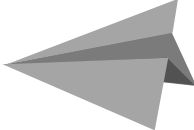
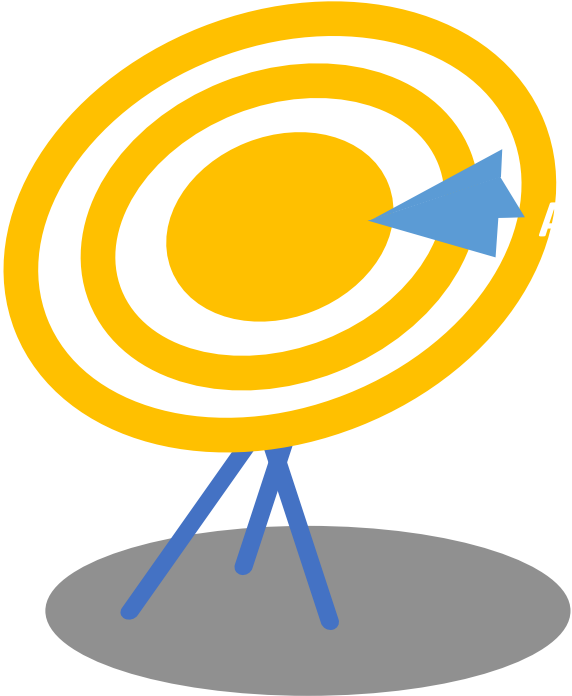
Identity Service Not Used

Manage fulfillment activities

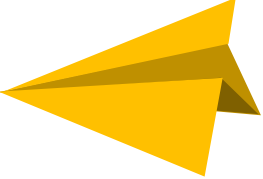
ExLibris

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Configuration Steps



Shared Users



Network

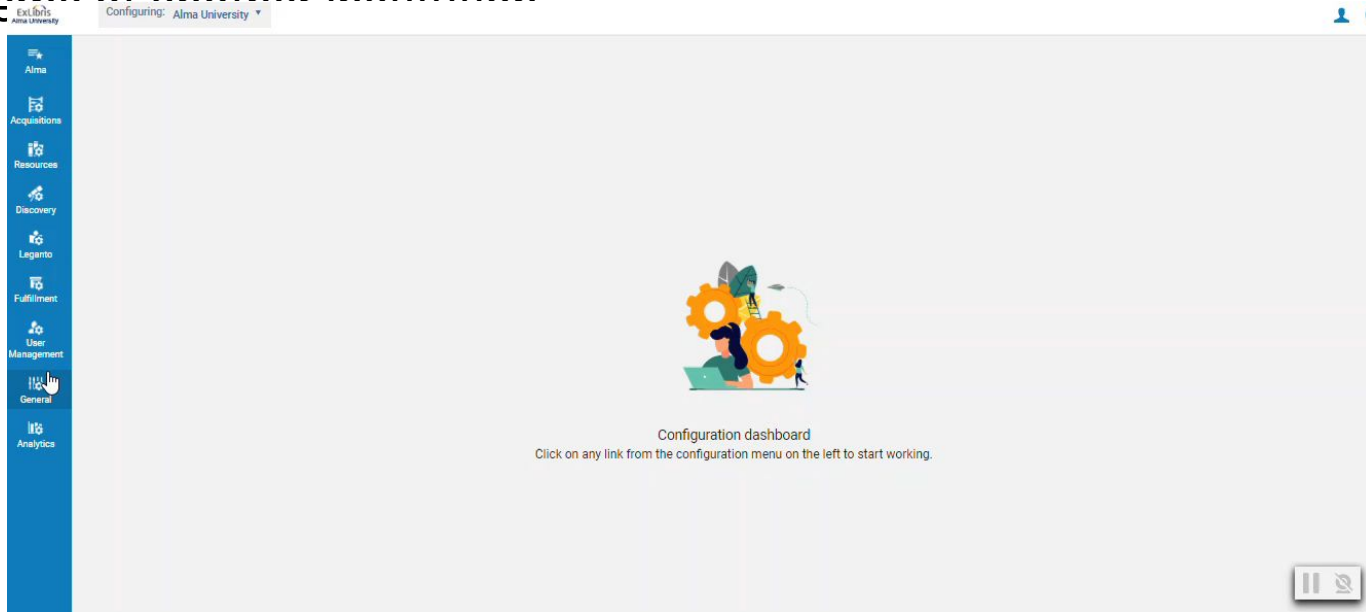


Loan Attributes

Library Relations

Institution relations determine:

- Which institution can potentially deliver items to which other institution
- Which institution can potentially circulate (check in\out) items of another institution



The screenshot shows the ExLibris Alma University configuration dashboard. At the top left, it says "ExLibris Alma University" and "Configuring: Alma University". A blue sidebar on the left contains a navigation menu with the following items: Alma, Acquisitions, Resources, Discovery, Leganto, Fulfillment, User Management, General (highlighted with a mouse cursor), and Analytics. The main content area is light gray and features a central illustration of a person sitting at a laptop with several interlocking gears. Below the illustration, the text reads "Configuration dashboard" and "Click on any link from the configuration menu on the left to start working." In the bottom right corner, there is a small gray button with a double vertical bar and a refresh icon.

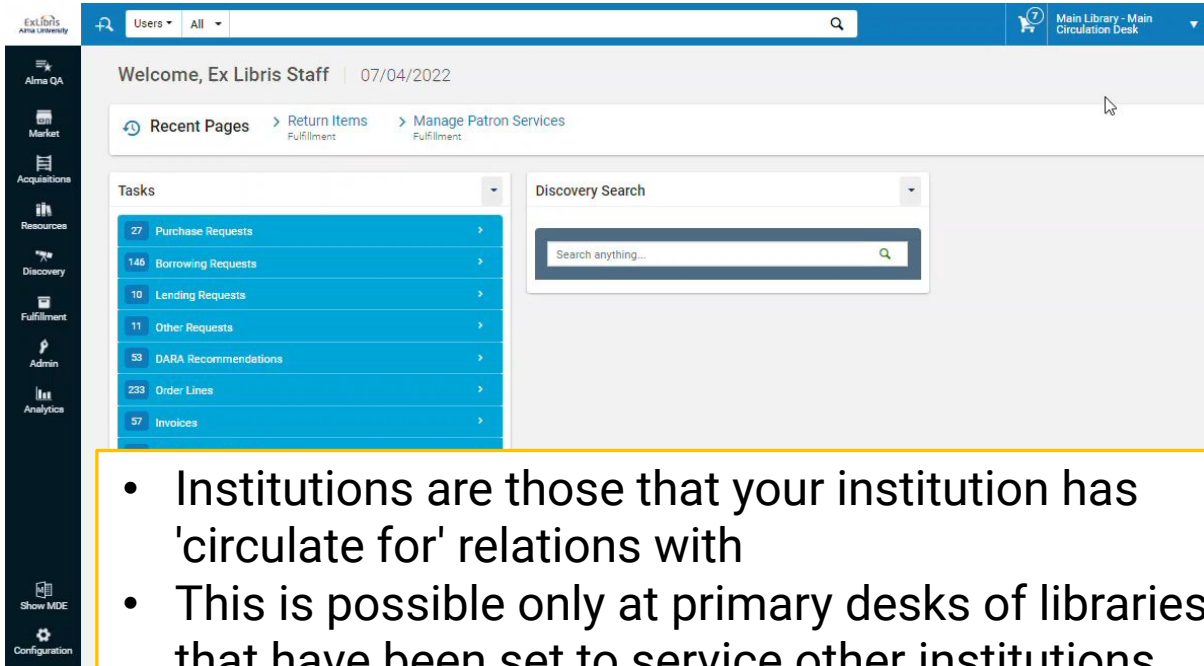
Library Serves Other Institutions

Libraries can check out\in items from libraries of other institutions only if they are set as libraries that serve other institutions.

The screenshot displays the ExLibris Alma University configuration interface. On the left is a blue sidebar with navigation links: Alma, Acquisitions, Resources, Discovery, Leganto, Fulfillment, User Management, General, and Analytics. The main content area is titled 'Configuring: Alma University'. A modal dialog box titled 'Manage Item Returns' is open, featuring a yellow border. Inside the dialog, the 'Item owner' dropdown menu is highlighted with a yellow box and contains the text 'My institution'. Below this, there are radio buttons for 'Place directly on hold shelf', with 'Yes' selected. At the bottom of the dialog, there is a search field for 'Scan item barcode' with the placeholder text 'Look-up or select' and an 'OK' button. The ExLibris logo and 'Part of Clarivate' are visible in the bottom right corner.

Loan Attributes

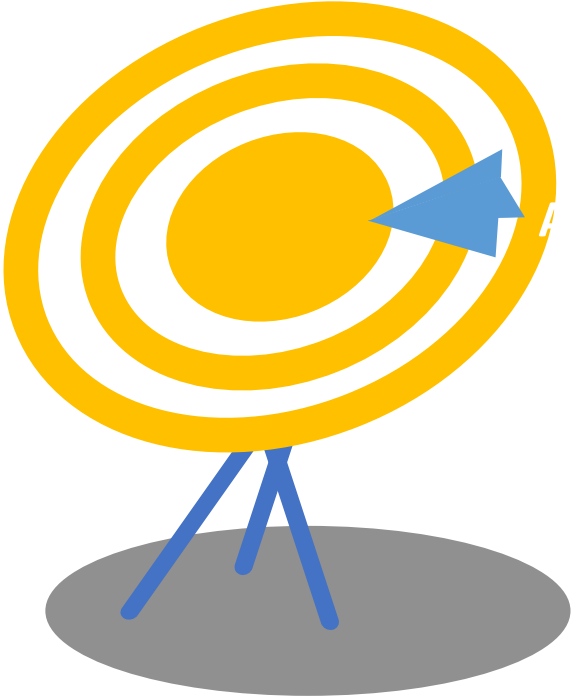
Testing the setup



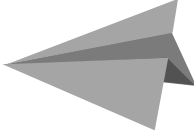
The screenshot displays the ExLibris Alma QA interface. At the top, there is a navigation bar with 'Users' and 'All' dropdown menus, a search icon, and a shopping cart icon with a notification badge. The main header area shows 'Welcome, Ex Libris Staff' and the date '07/04/2022'. Below this, there are breadcrumb links for 'Recent Pages', 'Return Items', and 'Manage Patron Services'. The central content area features a 'Tasks' list on the left and a 'Discovery Search' box on the right. The 'Tasks' list includes: Purchase Requests (27), Borrowing Requests (146), Lending Requests (10), Other Requests (11), DARA Recommendations (53), Order Lines (233), and Invoices (57). The 'Discovery Search' box contains a search input field with the placeholder text 'Search anything...'. A vertical sidebar on the left contains navigation icons for Alma QA, Market, Acquisitions, Resources, Discovery, Fulfillment, Admin, and Analytics, along with a 'Show MDE' and 'Configuration' option at the bottom.

- Institutions are those that your institution has 'circulate for' relations with
- This is possible only at primary desks of libraries that have been set to service other institutions

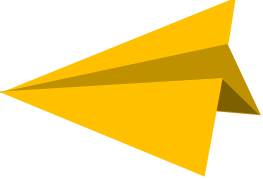
Configuration Steps



**Loan
Attributes**



Shared Users



Network



Request Attributes

Request Attributes

- To be able to request an item for pickup at another institution, the item's request policy must have the Pickup Location Policy set to **At Any Institution**

Policy Management

1 - 7 of 7

Policy Type : Pickup Locations

Policy Type	Policy Name	Value
1 Pickup Locations	Any institution	At Any Institution
2 Pickup Locations	Anywhere	In Institution
3 Pickup Locations	Pickup In Campus	In Campus

Request Attributes

- Testing the setup

← Create Request

Create Request

Request Type * Patron physical item request

Requester * Staff, Ex Libris

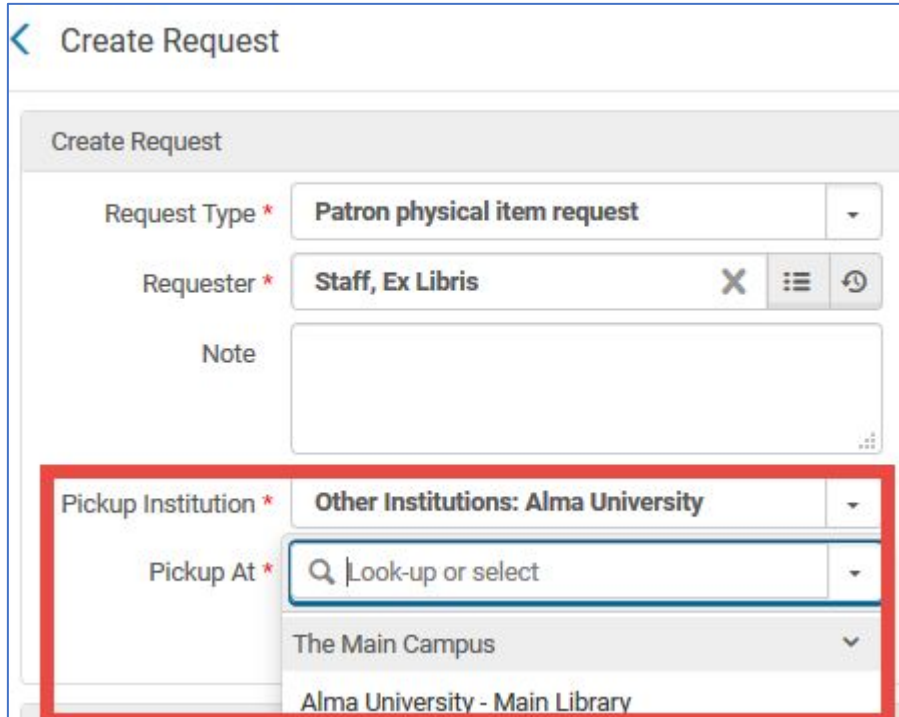
Note

Pickup Institution * Other Institutions: Alma University

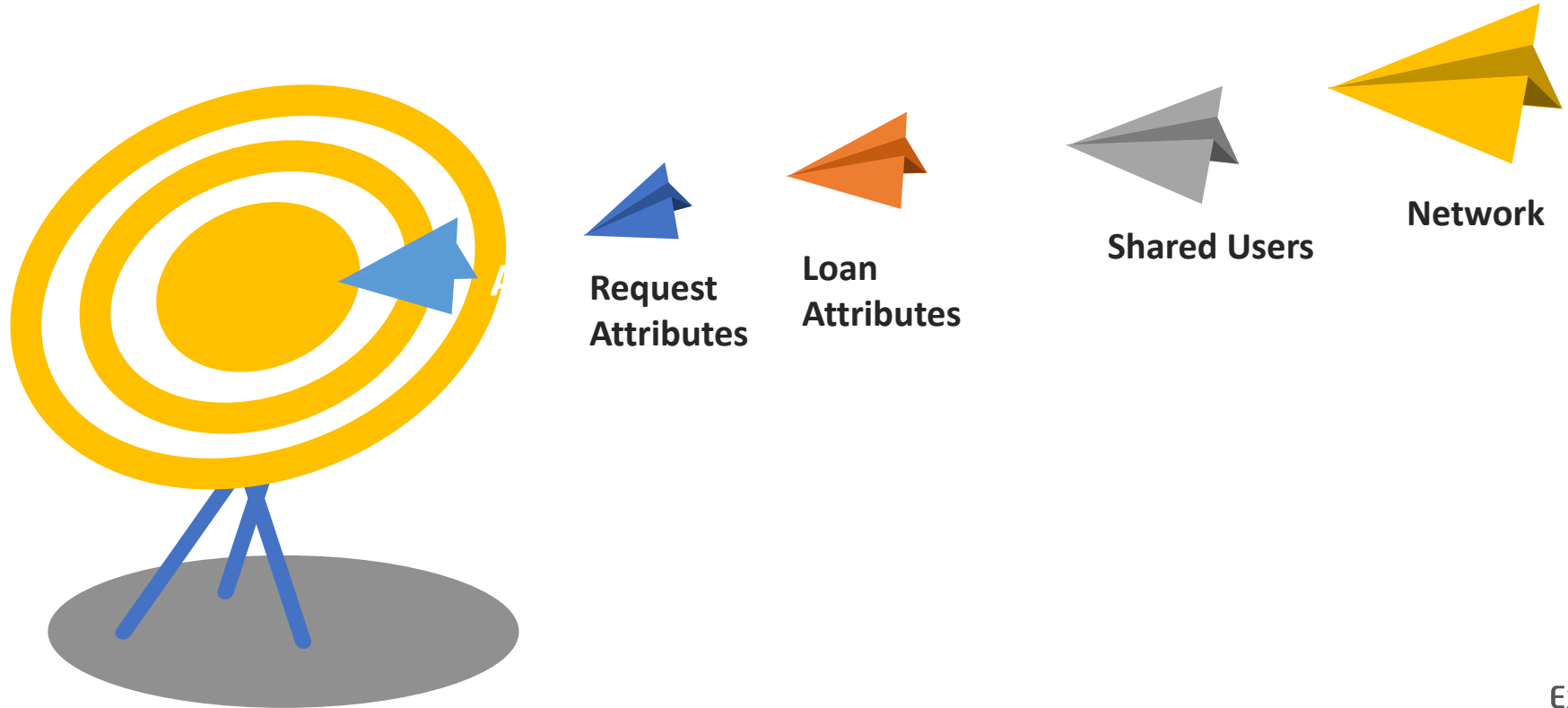
Pickup At *

The Main Campus

Alma University - Main Library



Configuration Steps

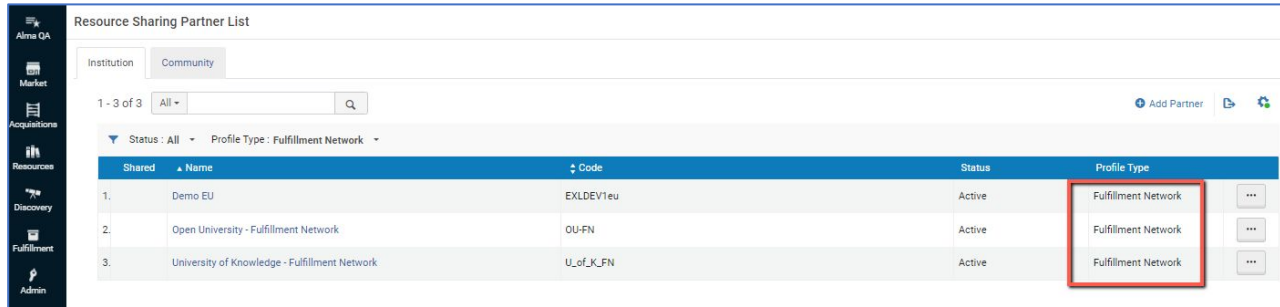




AFN

AFN

- Once we have a working FN all we need to make this an AFN is partners with a 'profile type' of 'Fulfillment Network'



Resource Sharing Partner List

Institution Community

1 - 3 of 3 All

Status: All Profile Type: Fulfillment Network

Shared	Name	Code	Status	Profile Type	
1.	Demo EU	EXLDEV1eu	Active	Fulfillment Network	...
2.	Open University - Fulfillment Network	OU-FN	Active	Fulfillment Network	...
3.	University of Knowledge - Fulfillment Network	U_of_KFN	Active	Fulfillment Network	...

AFN

- Testing the setup

Resource Sharing Borrowing Request

Additional person name

Series title number

Note

Part

Chapter author

Pages

End page

Request Attributes

Specific Edition Only

Requester *

Labels

Request Status

Requested Media

Preferred Send Method

Date Needed By

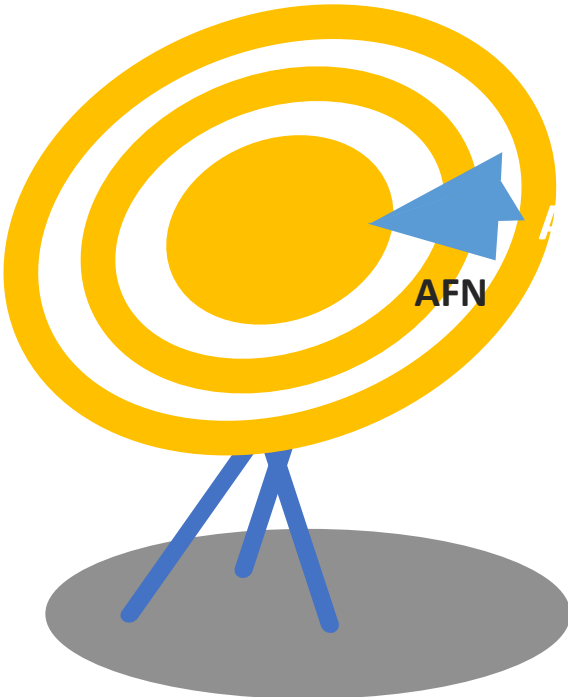
Preferred Pickup Institution

Preferred Local Pickup Location *

For Reading-Room Use Only

Willing to Pay

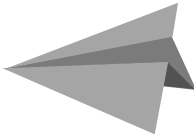
Configuration Steps



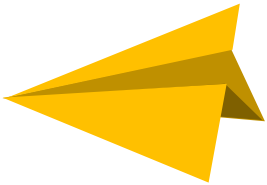
**Request
Attributes**



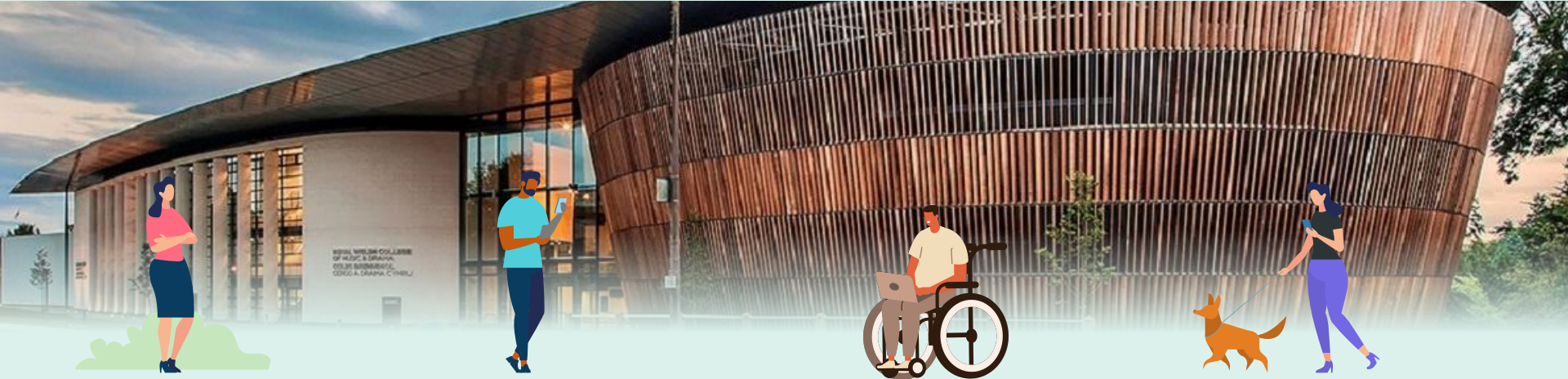
**Loan
Attributes**



Shared Users



Network



Thank you!

Moshe.shechter@clarivate.com

