

ORBIS  
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# The Unknown Knowns

Tightening Patron Privacy in Alma  
Circulation and Resource Sharing

Lori Hilterbrand - Program Manager

# Rummy and the Matrix

**Known knowns:** facts or variables that form the basis of our knowledge and provide a solid foundation for decision making.

**Known unknowns:** factors we know exist, but don't fully understand. They represent gaps in our knowledge.

**Unknown unknowns:** factors that we're not aware of and can't predict. "Things we don't know that we don't know."

**Unknown knowns:** elements that we don't realize we know.



Public Domain: Rumsfeld Resignation by James Bowman, U.S. Air Force (DOD Photo 061108-F-5586B-158)

# Elements we don't want others to know we know?

# University campuses are in the thick of it....



themysticsage. Campus Protest II. CC BY-NC-ND 3.0.  
<https://www.deviantart.com/themysticsage/art/Campus-Protest-II-1141642407> Retrieved 8/4/2025.



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# Privacy

“The right to privacy includes the right to open inquiry without having the subject of one’s interest examined or scrutinized by others, in person or online.”

“Lack of privacy and confidentiality has a chilling effect on users' selection, access to, and use of library resources.” (Privacy: An Interpretation of the Library Bill of Rights)

Article III of the Code of Ethics of the American Library Association states that confidentiality extends to “information sought or received and resources consulted, borrowed, acquired or transmitted,” including, but not limited to, reference questions and interviews, circulation records, digital transactions and queries, as well as records regarding the use of library resources, services, programs, or facilities. (ALA Code of Ethics)

## Think Locally

Many campuses have Institutional Privacy Policies, or Security Policies, that guarantee students and researchers enhanced privacy.

- Being aware of local policies may help you avoid complaints or legal issues.
- A local privacy or systems audit may ask you to examine business purposes of the records that you keep in Alma.
- How long you need to retain personally identifiable information is actually NOT a matter of opinion, but truly a matter of business, financial, and legal purpose.

## Four Privacy Configurations (and a suggestion)

- Use the Anonymization Job
- Use the Resource Sharing Completed Request Cleanup Job
- Stop sharing your borrowing requester information
- Set shorter letter retention periods
- And maybe explain Search History retention more carefully....

# Anonymization Job

Configuring: Pacific University ▾

## Fulfillment Jobs Configuration

### Anonymization Job

Status  Active  Inactive

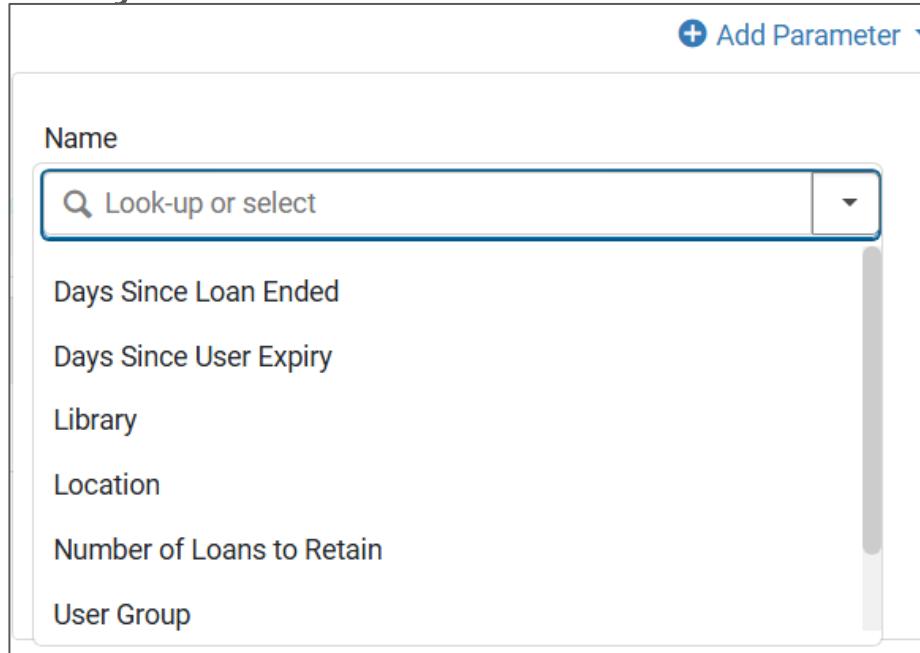
<input checked="" type="checkbox"/> Anonymize item loans	<input type="checkbox"/> Anonymize item loans Notes
<input checked="" type="checkbox"/> Anonymize fines and fees	<input type="checkbox"/> Anonymize fines and fees Notes
<input checked="" type="checkbox"/> Anonymize requests	<input type="checkbox"/> Anonymize requests Notes
<input checked="" type="checkbox"/> Anonymize resource sharing	<input type="checkbox"/> Anonymize resource sharing requests

requests Notes

Schedule  ▾

# Config>Fulfillment>General>Fulfillment Jobs Configuration

Item Loans can be retained based on these parameters, even if you choose to anonymize:



The image shows a screenshot of a software interface titled 'Add Parameter'. At the top right is a blue button with a plus sign and the text 'Add Parameter'. Below the title, the word 'Name' is displayed. A search bar with a magnifying glass icon and the placeholder text 'Look-up or select' is present. To the right of the search bar is a dropdown arrow. Below the search bar, a list of parameters is shown in a scrollable area: 'Days Since Loan Ended', 'Days Since User Expiry', 'Library', 'Location', 'Number of Loans to Retain', and 'User Group'. The 'Days Since Loan Ended' item is currently selected, as indicated by a blue border around its text.

## Turn on as many as you are comfortable with!

- Check in with colleagues
- Go little by little as you figure out how it works if you need to
- Use the Rules links in the right side of the job window to specify exceptions. For example if you want to anonymize item loans, but aren't allowed to anonymize them for Special Collections, you can make a rule that specifies that.
- **Please note** that changing a hold or resource sharing request to a purchase request removes the ability to anonymize.

# Special Collections Exception Sample

Anonymization Rule Editor

Name *	Special Collections Retention		
Description	Per Security Agreements		
Created By	Network	Created On	07/08/2025
Updated By	Network	Updated On	07/08/2025

Input Parameters

[+ Add Parameter ▾](#)

Name	Operator	Value
1 Library	In List	Archives & Special Collections—Archives Building , Archives & Special Collections—Wilson Library Building , Archives Building-Washington State Archives—NW Regional Branch

Output Parameters

Anonymize *	False
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## Parameter Notes

- “Days since request or loan ended” are frequently used rule parameters.
- A rule can have multiple parameters, and they work together as “AND” so all parameters have to be met for the rule to apply.
- Fines and fees often require more documentation / retention. Be sure to ask all of the appropriate people before jettisoning financial information. (Not that I ever made a mistake like that)
- The **default anonymization rules are set to True**, so all of your exception rules will need to be set to False.

# Why?

			
◆ Borrower name	◆ Borrower id		
Hesitation, Fatal	lori.hilterbrand		
Hesitation, Fatal	lori.hilterbrand		
-	-		

**Nasty women : feminism, resistance, and revolution in Trump's America / edited by Samhita Mukhopadhyay and Kate Harding. Picador, New York, NY : 2017 [1250155509]**

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**Holdings**

**Forest Grove: FG Main Collection; HQ1421 .N37 2017**

**Holdings ID**

**22100140030001455**

**[View all holdings](#)**

# Resource Sharing Completed Request Cleanup

Configuration>Fulfillment>General>Fulfillment Jobs Configuration

Resource Sharing Completed Request Cleanup

Status	<input checked="" type="radio"/> Active <input type="radio"/> Inactive	Request Type	Both	Days since request completion *	731
Completed requests statuses	<p>Borrowing : All <input type="button" value="X"/></p> <p>Lending : All <input type="button" value="X"/></p>	Schedule	Every Sunday at 22:00		

## Job Notes

- The rule only deletes completed requests, so talk to your partners about the ones that aren't completed - confirm, and clean them up on both sides.
- Check for local retention requirements before deleting request records.
- Double check that the job “Resource Sharing Completed Request Cleanup Job” is enabled at Admin>Monitor Jobs and choosing the Scheduled tab. Make sure the active toggle switch is lit - if not toggle it on.

16	<input checked="" type="checkbox"/>	Handle Expired Booking Requests	Fulfillment	lo
17	<input checked="" type="checkbox"/>	Resource Sharing Completed Request Cleanup Job	Fulfillment	lo
18	<input checked="" type="checkbox"/>	Clean logical deleted lists job	Fulfillment	lo

# Why?

Request Attributes

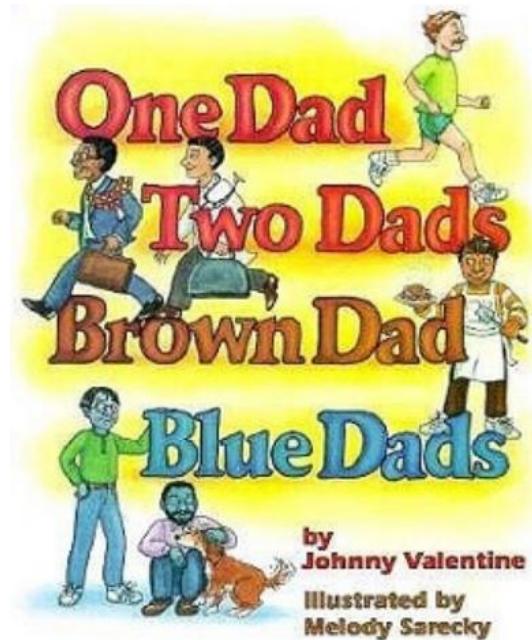
Title **One dad, two dads, brown dad, blue dads /**

Specific Edition Only

Requester \* **Hesitation, Fatal** X ≡ 👤

Labels

Owner \* **Hillsboro**



# Stop sending requester information

Fulfillment>Resource Sharing>  
Partners

< Resource Sharing Partner

General Information Contact Information Parameters Notes Attachments

ALTERNATIVE DELIVERY ADDRESS

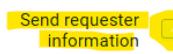
Supports ADD Address

GENERAL INFORMATION

Server \* na01-psb.alma.exlibrisgroup.com

Symbol \* WWU

Request Expiry  No expiry  Expire by interest date  Expiry time

**Send requester information** 

Shared Barcodes

Ignore Lender Shipping Cost

Resending Overdue Days Interval

## Requester Information Details

- Checking or unchecking this box only impacts what your library will send, not what will be sent from borrowing institutions.
- If you do not want your patron data exposed at other institutions, uncheck the **Send requester information** box for each of your active partners.
- You will most likely want to enable the letter named **Ful Hold Shelf Request Slip Letter** to provide a slip for your hold shelf other than the ILL paperwork. When receiving borrowing requests, select **Automagically print slip**.

# Why?

## **Hesitation, Fatal**

**Ship To: PU-FG - Pacific University Forest Grove**

**Pickup Location : Forest Grove**



## **Resource Sharing Lending Slip Letter**

**Location: Wilson 4 West - Books**

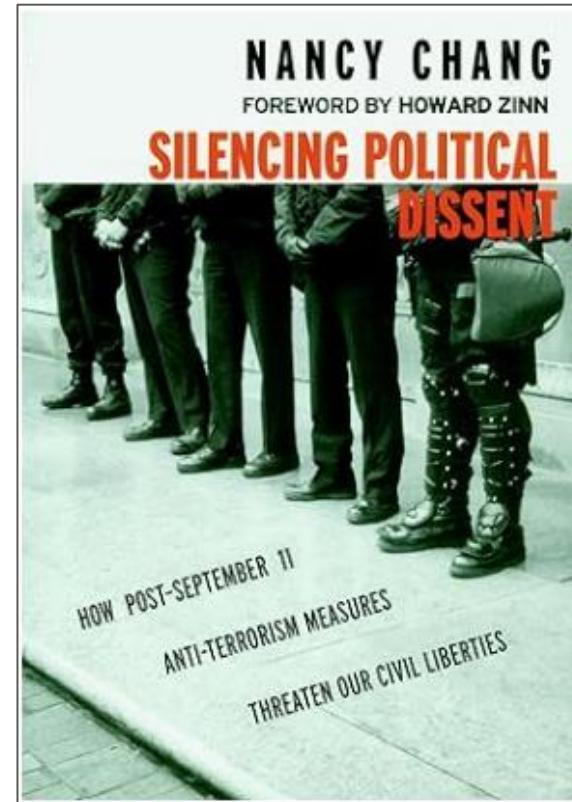
**Call Number: JC571 .C53 2002**

**Item Barcode: 35132502336779**

**Title: Silencing political dissent /**

**Edition: 1st ed.**

**Borrower Reference: 01ALLIANCEPU0025918**



# Letter Retention Periods

Configuration >  
General >  
Letters >  
Letter  
Configuration

Letters Configuration

Enabled	▲ Letter	◆ Description	Channel	Retention Period	Managed in Network
5...	<input type="checkbox"/>	Ful Overdue And Lost Loan Notification Letter	Sms Overdue And Lost Loan Notification Letter	SMS	-
5...	<input checked="" type="checkbox"/>	Ful Personal Delivery Letter	Ful Personal Delivery Letter	EMAIL	-
5...	<input type="checkbox"/>	Ful Pickup Print Slip Report Letter	Pickup Print Slip Report Letter	EMAIL	-
5...	<input checked="" type="checkbox"/>	Ful Renew Email Letter	Ful Renew Email Letter	EMAIL	-
5...	<input checked="" type="checkbox"/>	Ful Requests Report Letter	Ful Requests Report Letter	EMAIL	-
6...	<input checked="" type="checkbox"/>	Ful Resource Request Slip Letter	Ful Resource Request Slip Letter	EMAIL	-

## How long do you need to keep that?

- Remember to only keep things as long as you actually need them.
- Is it important to keep an on-holdshelf notification?
- Do you need to retain an overdue notification longer than a loan receipt?
- Can the information in the notification be found elsewhere?
- You can set the retention period to 1 day, but notifications are only deleted once a week (on Fridays).

# Why?

All of these letters link patron data to requested, loaned, or returned materials:

- Automatic Loans Renew Notice
- Borrowed By Letter
- Borrowing Activity Letter
- Change Rapido Request Terms Letter
- Courtesy Letter
- Document Delivery Notification Letter
- Ful Borrowing Info Letter
- Ful Cancel Request Letter
- Ful Digitization Notification Item Letter
- Ful Hold Shelf Request Slip Letter
- Ful Incoming Slip Letter
- Ful Lost Loan Letter
- Ful Lost Loan Notification Letter
- Ful Lost Refund Fee Loan Letter
- Ful Overdue And Lost Loan Letter
- Ful Overdue And Lost Loan Notification Letter

# Why Continued...

- Ful Personal Delivery Letter
- Ful Requests Report Letter
- Ful Resource Request Slip Letter
- Ful Transit Slip Letter
- Hold Shelf Expiry Date Update Letter
- ILL EMAIL TO USER
- Loan Receipt Letter
- Loan Status Notice
- On Hold Shelf Letter
- On Hold Shelf Reminder Letter
- Overdue Notice Letter
- Query To Patron Letter
- Resource Sharing Receive Slip Letter
- Resource Sharing Request Confirmation Letter
- Resource Sharing Shipping Slip Letter
- Return Receipt Letter
- Saved Searches Letter
- Shortened Due Date Letter
- Short loan Letter
- User Notifications (New Gen)
- User Notifications Letter

## And a suggestion... Primo Persistent Search History

Library: Primo Home > General > Mapping Tables

- Display User Settings (whether users see the options)
- Save Users Search History (whether users can save)
- Default User Search History Off (whether settings are enabled)

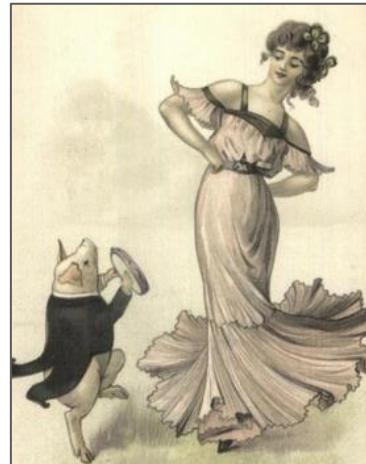
User (if enabled): Login > Personal Details and Settings

- Saved per view
- Disable saving search history
- Disable using search history for search suggestions

# Why?

The user's going to pick dancing pigs over security every time.

– Bruce Schneier



Public Domain: Beautiful Girl and Tux Pig Dancing c1905 Unknown.

**Questions?**