



The Unknown Knowns

Tightening Patron Privacy in Alma
Circulation and Resource Sharing

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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

☒ Anonymize item loans

☒ Anonymize fines and fees

☒ Anonymize requests

☒ Anonymize resource sharing requests

☐ Anonymize item loans Notes

☐ Anonymize fines and fees Notes

☐ Anonymize requests Notes

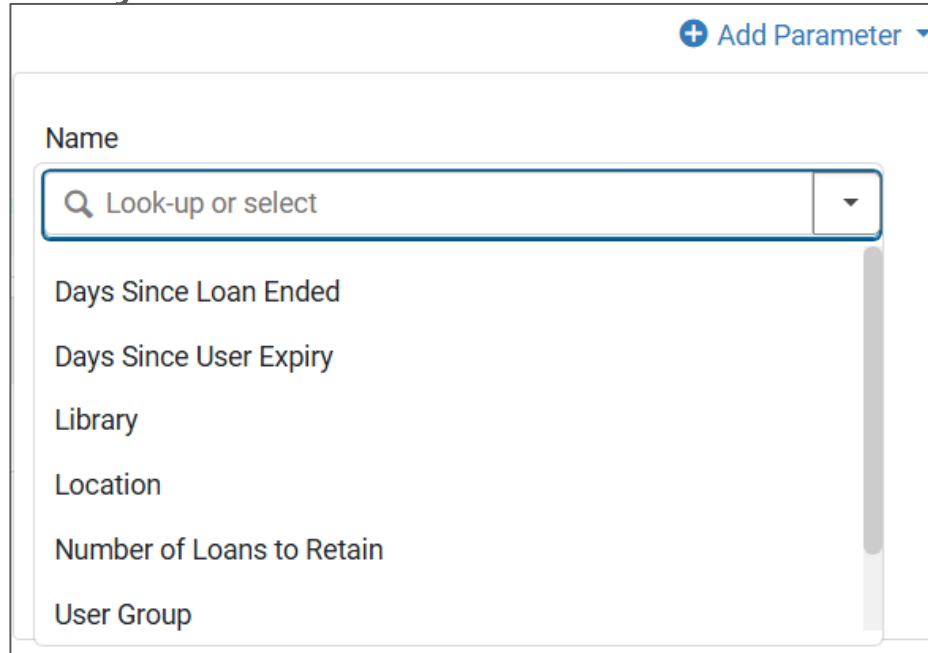
☐ Anonymize resource sharing requests Notes

Schedule

Every day at 23:00 ▼

Config>Fulfillment>General>Fulfillment Jobs Configuration

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



The screenshot shows a configuration window titled "Fulfillment Jobs Configuration". At the top right, there is a button labeled "+ Add Parameter" with a dropdown arrow. Below this, the "Name" field is highlighted with a blue border. It contains a search icon and the text "Look-up or select". A dropdown menu is open below the search field, displaying a list of parameters: "Days Since Loan Ended", "Days Since User Expiry", "Library", "Location", "Number of Loans to Retain", and "User Group". A vertical scrollbar is visible on the right side of the list.

+ Add Parameter ▾

Name

🔍 Look-up or select ▾

- Days Since Loan Ended
- Days Since User Expiry
- Library
- Location
- Number of Loans to Retain
- User Group

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

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]

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

Active

Inactive

Request Type

Both

Days since request completion *

731

Completed requests statuses

Borrowing :

All

Lending :




All

Schedule

Every Sunday at 22:00

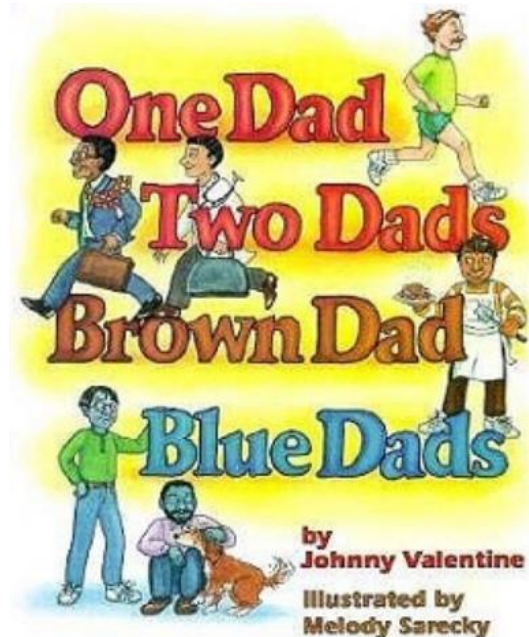
Job Notes

- 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		Handle Expired Booking Requests	Fulfillment	lo
17		Resource Sharing Completed Request Cleanup Job	Fulfillment	lo
18		Clean logical deleted lists job	Fulfillment	lo

Why?

Request Attributes	
Title	One dad, two dads, brown dad, blue dads /
Specific Edition Only	<input checked="" type="checkbox"/>
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

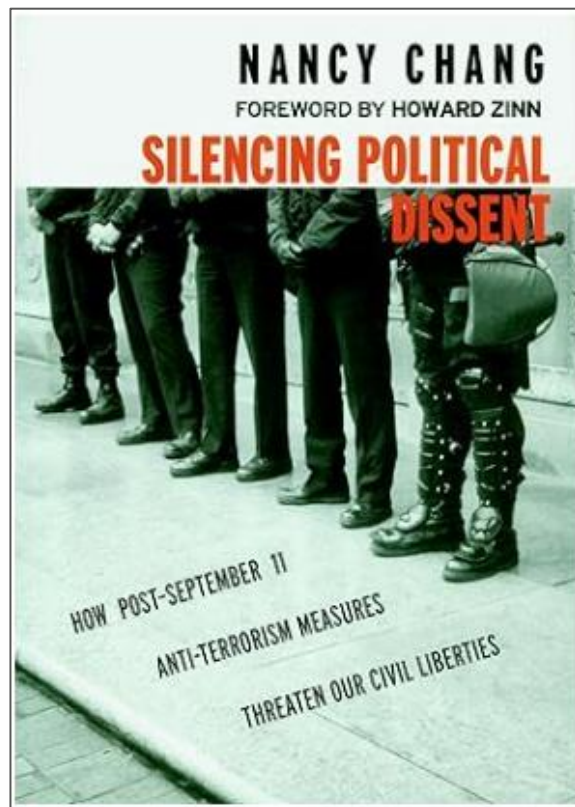
Call Number: JC571 .C53 2002

Item Barcode: 35132502336779

Title: Silencing political dissent /

Edition: 1st ed.

Borrower Reference: 01ALLIANCEPU0025918



Letter Retention Periods

Configuration >
General >
Letters >
Letter
Configuration

Letters Configuration						
	Enable d	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	<input type="text"/>	-
5...	<input type="checkbox"/>	Ful Pickup Print Slip Report Letter	Pickup Print Slip Report Letter	EMAIL	<input type="text"/>	-
5...	<input checked="" type="checkbox"/>	Ful Renew Email Letter	Ful Renew Email Letter	EMAIL	<input type="text"/>	-
5...	<input checked="" type="checkbox"/>	Ful Requests Report Letter	Ful Requests Report Letter	EMAIL	<input type="text"/>	-
6...	<input checked="" type="checkbox"/>	Ful Resource Request Slip Letter	Ful Resource Request Slip Letter	EMAIL	<input type="text"/>	-

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?