

Fulfillment Units

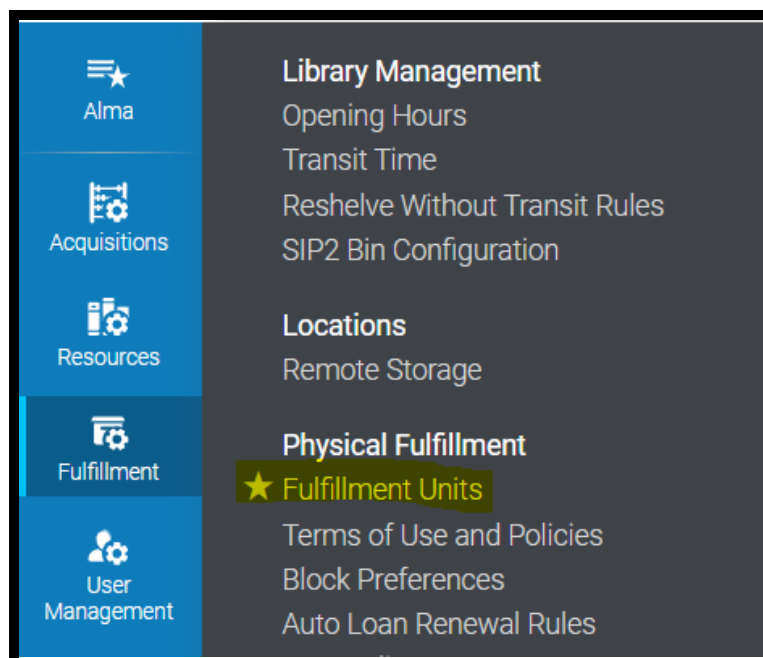
Description:

A fulfillment unit is a group of locations that are requested and circulate similarly. Fulfillment unit rules can be used to apply Terms of Use (TOUs) to subsets of materials based on location, material type, item policy, process type, and users.

***Note:** Fulfillment Units, TOUs, and Item Policies should usually be made at the institution level, rather than the library level, for simplicity and to ensure a clean order of operations.

Exlibris Knowledge Center [Website](#)

Ex Libris LibGuide: [Fulfillment Units Video](#)



Fulfillment Units List		
1 - 5 of 5		
Name Q		
Code	Name	Owner
1. Regular	Regular	Institution
2. Limited	Limited	Institution
3. Reserve	Reserve	Institution
4. Short loan	Short loan	Institution
5. Equipment	Equipment	Institution

Parts of a Fulfillment Unit:

Fulfillment Unit Details

Fulfillment Unit Locations

Fulfillment Unit Rules

Code * Regular

Name * Regular

Description

On Shelf Request Policy *

☒ Request for pickup anywhere regardless of availability

☐ Request for pickup in different library only

☐ Request for pickup in different campus only

☐ No Requesting from available holding

☐ No Requesting

Use Rules From Network Fulfillment Unit

Fulfillment Unit Details

The options on this screen set your default requesting policy for the unit - or how items can be put on a holdshelf. The unit name should be an obvious indicator of the purpose or behavior of the unit. The description field is optional but can be useful for making clear the intentions of the unit and its settings. The Alliance does not have a Fulfillment Network so the dropdown list for **Use Rules from Network Fulfillment Unit** is unpopulated and not used in our consortium

Your **On shelf request policy** defines the way in which an item can (or cannot) be requested when it is on the shelf. Choose from the following options for the default behavior of requesting. You can use fulfillment unit request rules to handle exceptions.

- **Request for pickup anywhere regardless of availability** – All pickup locations that are allowed according to the Pickup Locations policy are available, regardless of whether the item is on the shelf.
- **Request for pickup in different library only** – Removes the owning library from the list of available library pickup locations.
- **Request for pickup in different campus only** – Removes the owning campus from the list of available campus pickup locations.
- **No requesting from available holdings** – If an item from the holdings is available, all items from that holdings may not be requested for pickup at any pickup location. All items from other holdings are not impacted.
- **No requesting** – If an item attached to this rule is available, it may not be requested for pickup at any pickup location.

Fulfillment Unit Details

Fulfillment Unit Locations

Fulfillment Unit Rules

1 - 20 of 22

Code ▾

Attach existing location

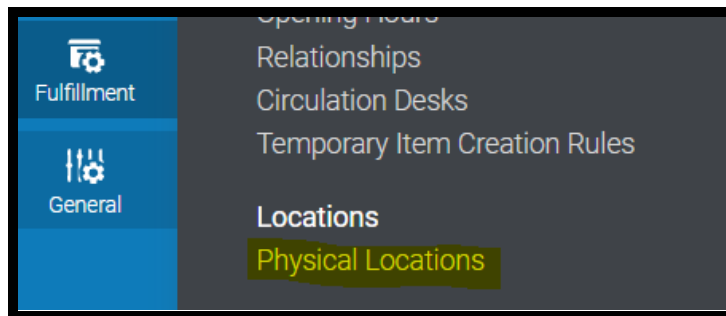
Physical Location Type : ▾

↕ Code	▲ Name	↕ Library Name	↕ Location Type	
1	cststack	HAT 1st Floor CST	MOH	Open
2	folio	HAT 2nd Floor Folio	MOH	Open
3	folcd	HAT 2nd Floor Folio CD	MOH	Open
4	score	HAT 2nd Floor Score	MOH	Open
5	stack	HAT 2nd Floor Stacks	MOH	Open
6	cass	HAT AV Cassette	MOH	Open

Fulfillment Unit Locations

This screen contains the list of physical locations at your institution that are governed by the fulfillment unit's settings and rules.

***Note:** Locations themselves can not be edited from this screen, only added or removed from the fulfillment unit. To edit a physical location, from the configuration menu choose the library the location belongs to in the **Configuring** dropdown menu, then find the location in your **Physical Locations** list.

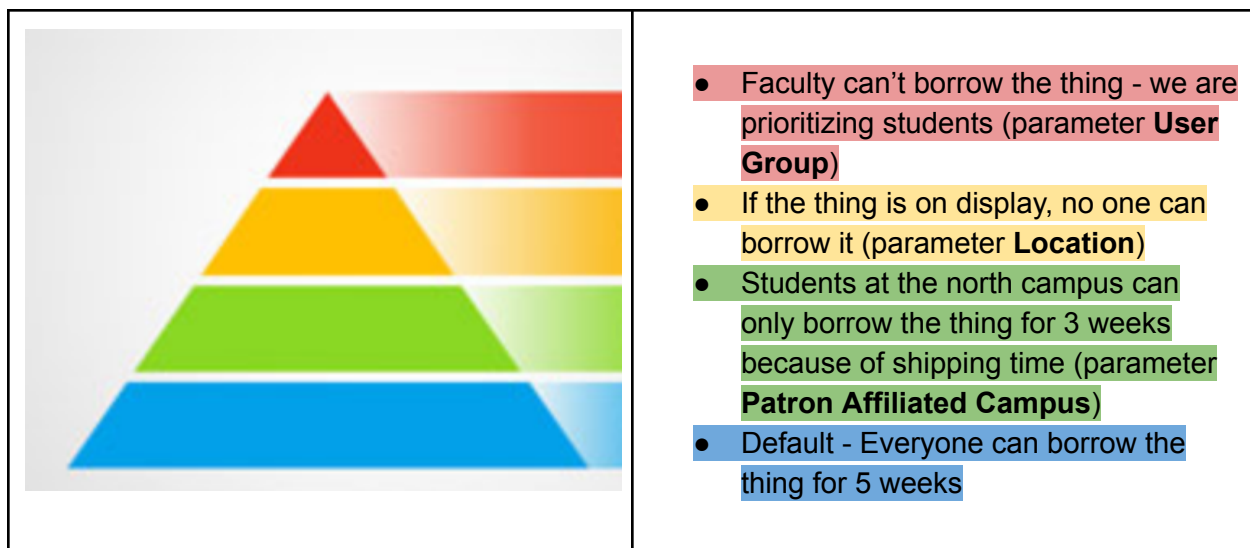
A screenshot of the 'Fulfillment Unit Rules' configuration screen. At the top, there are three tabs: 'Fulfillment Unit Details', 'Fulfillment Unit Locations', and 'Fulfillment Unit Rules' (which is active and highlighted in yellow). Below the tabs, there is a 'Rule Type' dropdown menu with a search icon and the text 'Look-up or s'. A dropdown menu is open below it, showing three options: 'Loan', 'Request', and 'Booking'. To the right of the dropdown is an 'Add Rule' button with a plus icon. Below this is a 'Filter: All' dropdown. The main part of the screen is a table with the following columns: 'Enabled', 'Move Up', 'Move Down', 'Rule Name', 'Description', 'Output', 'Updated By', and 'Update D'. There are three rows of rules listed in the table.

	Enabled	Move Up	Move Down	Rule Name	Description	Output	Updated By	Update D
1	☐		v	6 Day loan	-	6 Day Regular Priority	bkelm	05/19/20
2	☒	▲	▼	On Display Popular - 6 Week Loan	-	6 week popular loan items	cbracerossimon	08/19/20
3	☒	▲	▼	6 week hpop items	-	6 week popular loan items	bkelm	09/01/20

Fulfillment Unit Rules

This is the meatiest section of the fulfillment unit. The rules created here indicate how materials in the unit are circulated, requested, or booked. The rules are applied hierarchically, with the default (or most common) behavior at the base, and all of the exceptions to that default rule piled on top - with the most specific rules at the very top.

A great example for loan rules would look like this in text form:



Examine the order of the rules. They will be applied by Alma from the top down, and Alma will stop searching down the list once a match is found.

***Pro-Tip:** To confirm that your rules are operating as intended, use the **Fulfillment Configuration Utility** found in the production Fulfillment Menu to test your user group and item combination. The utility will indicate which rule is being applied for loans, requesting and booking, and display the details of the associated TOU.

Fulfillment Configuration Utility

Patron Identifier *

Hilterbrand, Lori - LIBRAI



Item Barcode *

31707102514794-



Loan

Request

Booking

Overdue and Lost Loan Profiles

Fulfillment Attributes

Fulfillment Unit
Name

Regular

Fulfillment Unit Rule

6 month Staff Regular

Terms Of Use Name

6 month Staff Regular

Due date if the item
would be loaned
now

03/29/2021 11:59:00 PM PDT

Return date



Calculate Overdue Fine

Terms of Use Policies

	Policy Type	Policy Name	Policy Description
1	Block When Overdue	No block when overdue	Do not create a block when overdue
2	Overdue Notification Fine Type 1	No Overdue Fine	Default value - No Overdue Fine
3	Overdue Notification Fine Type	No Overdue Fine	Default value - No Overdue Fine