Fulfillment

How material, both physical and digitized, is shared with patrons.

Types of Fulfillment requests include:
Booking
Hold
CLS/AFN
Resource Sharing
Move (both temporary and permanent)
ILL (both physical and digitization)

- CLS/AFN
  - Faculty Due Date Maintanance
  - Consortial Partners in CLS/AFN
- Resource Sharing
- Addons
  - Alma Digitization Request Addon
  - Alma Physical Item Request Addon
- Libraries and Location codes
  - Delivery locations with Codes
  - Maps and courier routes
- Letters managed in the NZ for Physical Item Requests
  - Pull Slip (Ful Resource Request Slip Letter)
  - On Hold Shelf Letter
- wrlc user
  - Updating a patron's linked account.

CLS/AFN

Common policies and task related to consortial lending and borrowing.

CLS/AFN

Faculty Due Date Maintanance

Each IZ that participates in consortial lending needs to maintain the fixed due date on their calendars for patrons in "wrlc user" user group with the "WRLC Faculty" job category. This is done 3 time a year so that Faculty can have loans that last the semester. The dates are changed about 6 weeks prior to the expiration of the current due date.

The designated due dates are January 31st for the Fall semester, May 31st for the Spring semester, and September 30th for the Summer sessions.

The dates are changed on the following schedule:

- January 31 due date is set on about August 15th.
- May 31st due date is set on about December 15th.
- September 30th due date is set on about April 15th.

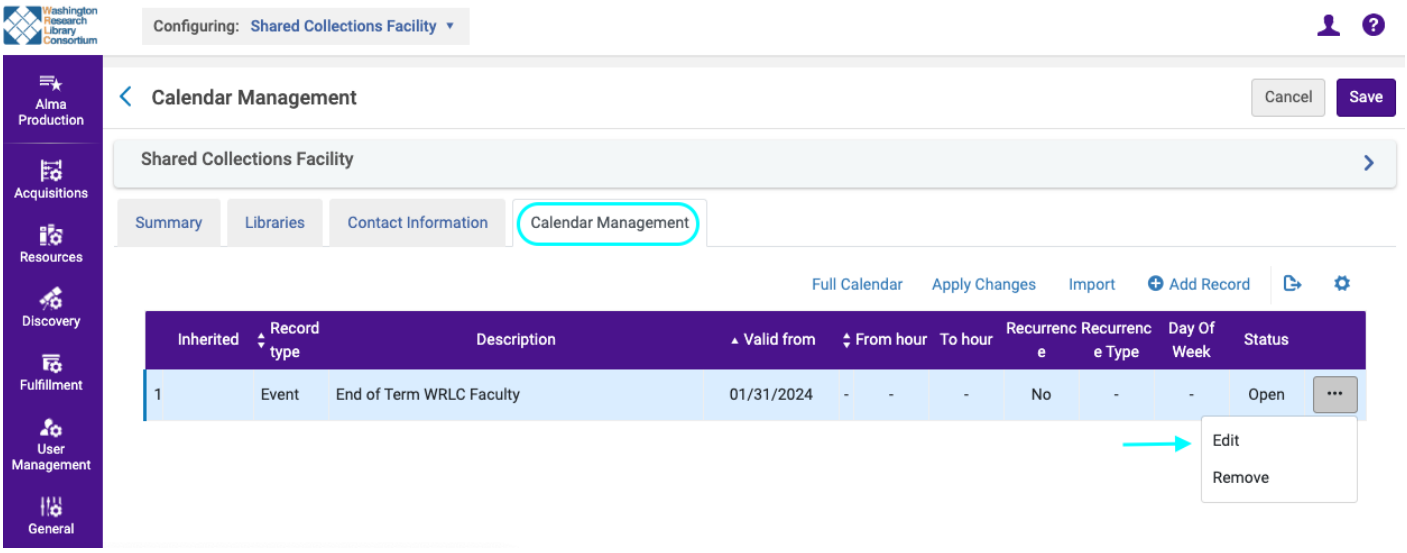
Procedure: Update the Faculty Due Date

The following procedure assumes that the "End of Term WRLC Faculty" date is configured at and inherited from the Institution's Calendar. All Libraries under the IZ that have this date on their calendar will be updated by the procedure below.

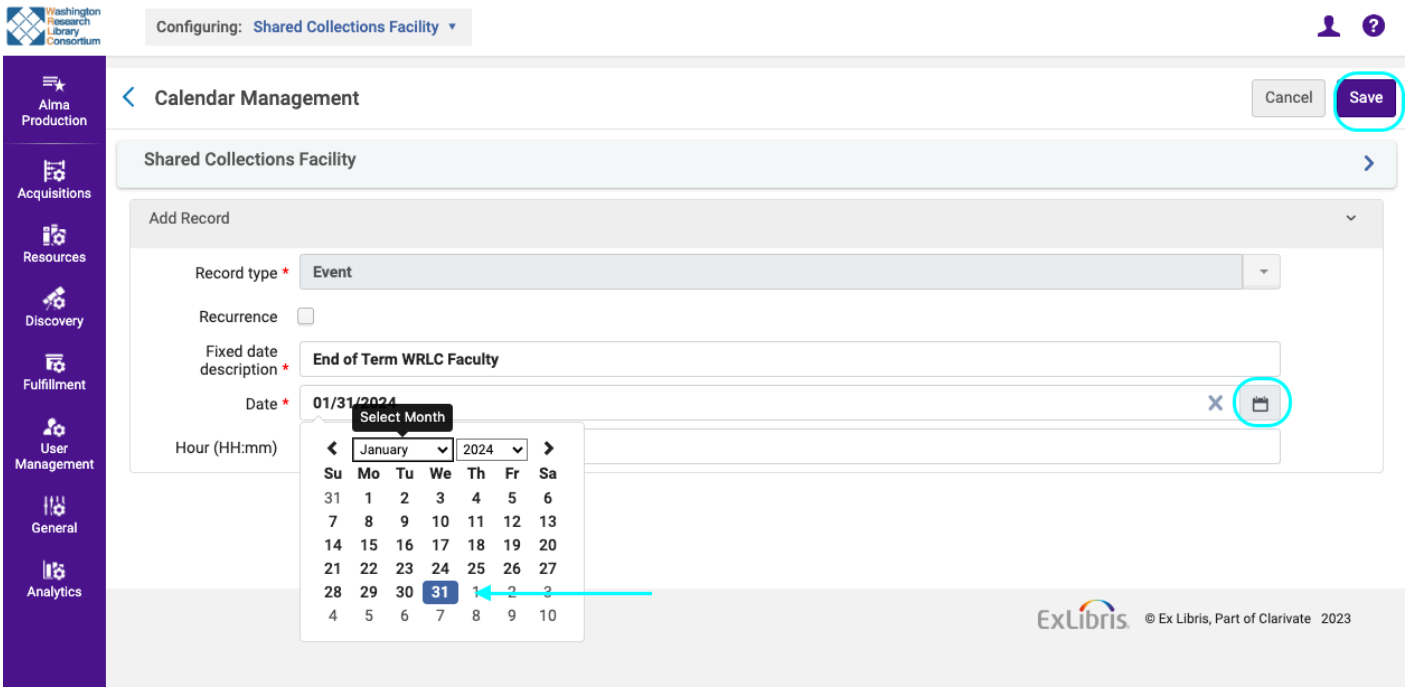
If you do not have this date configured on the Institution Calendar, you will need to select the individual Libraries that have this date and update them individually following the same basic procedure except at the Library level.

Go To: Alma --> Configuration --> General --> Libraries --> Add a Library or Edit Library Information

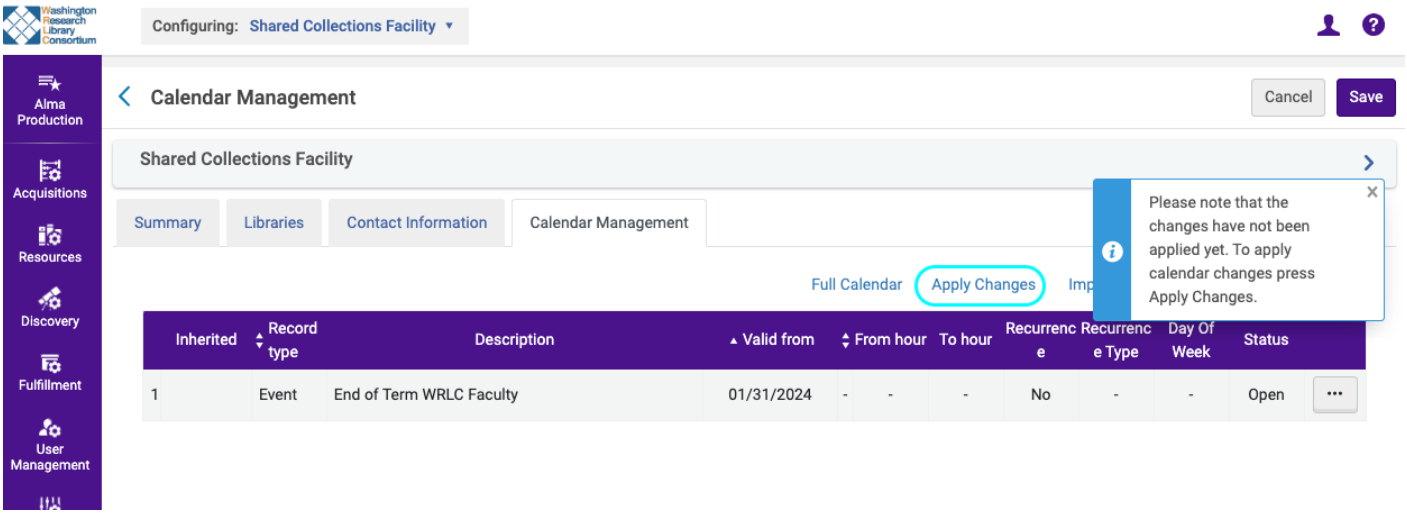
Select the Calendar Management tab. Click on the ellipsis to Edit the "End of Term WRLC Faculty" date. Select Edit.



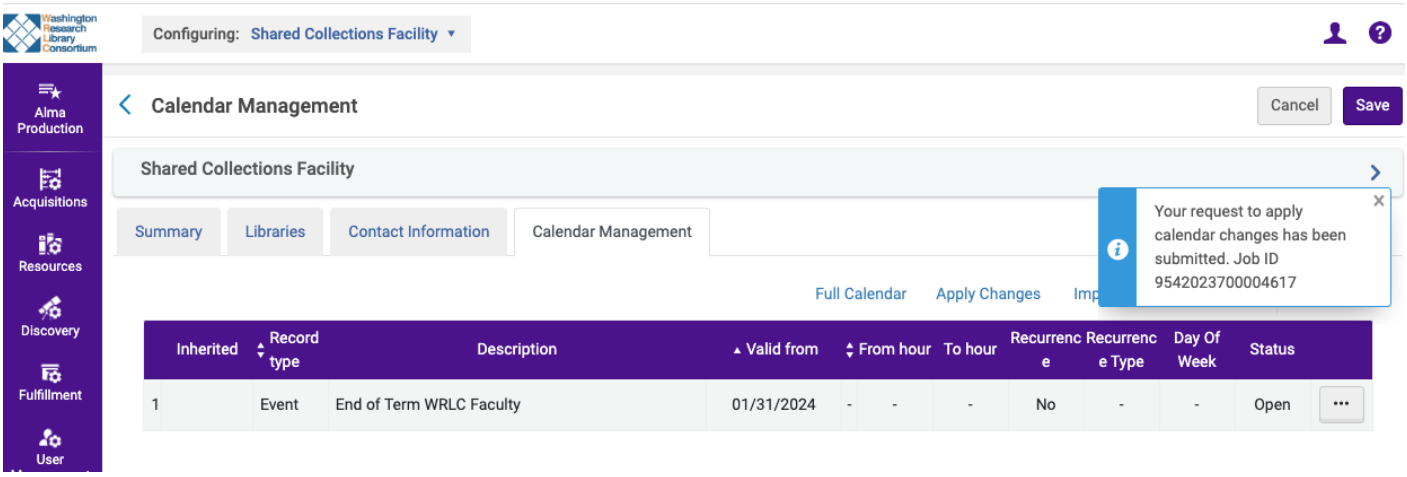
Click on the calendar button on the right. Select the new "End of Term WRLC Faculty" date. Then Save.



After saving, make sure that you "Apply Changes"!



You will be notified once you submitted the job to apply the changes.



The "End of Term WRLC Faculty" date is now updated.

Consortial Partners in CLS/AFN

Lending and Borrowing Partners

These partners are configured in the ROTA for the "Consortium Book Borrowing"

- American University - 01WRLC_AMU
- Catholic University of America - 01WRLC_CAA
- Gallaudet University - 01WRLC_GAL
- George Mason University - 01WRLC_GML
- Georgetown University - 01WRLC_GUNIV
- George Washington University - 01WRLC_GWA
- Howard University - 01WRLC_HOW
- Marymount University - 01WRLC_MAR
- University of the District of Columbia - 01 WRLC_DOC
- Washington Research Library Consortium (SCF) - 01WRLC_SCF

Borrowing Partners*

- American University, Washington College of Law - 01WRLC_AMULAW
- Catholic University of America, Columbus School of Law - 01WRLC_CUALAW
- Georgetown University Law Center - 01WRLC_GUNIVLAW
- George Washington University School of Medicine and Health (Himmelfarb Health Sciences Library) - 01WRLC_GWAHLTH
- George Washington University Law School (Jacob Burns Law Library) - 01WRLC_GWALAW
- University of the District of Columbia, David A. Clarke School of Law - 01WRLC_DOCLAW
- Trinity Washington University - 01WRLC_TRN

*Borrowing partners do not lend via CLS although they may lend via ILL requests and other methods.

Resource Sharing

Addons

Information on Addons that enhance SCF processing of both physical and digitial requests.

Alma Digitization Request Addon

RSAC decided that all digitization request be made though ILLiad. To facilitate requests for material held at the SCF, the Alma digitization addon for ILLiad was created. This Addon takes an ILLiad digitiation request and creates an Alma digitization request that is sent to the SCF IZ.

The source code and installation instructions can be found on github here:

Alma_Digitization_Addon.

TO BE COMPLETED.

Alma Physical Item Request Addon

SCF request processing is transitioning from using emails for items to be sent to fill an ILLiad request for our partners to requests generated in Alma by the Alma_Physical_Addon. This new request path provides for more accountability and documentation. It will also be easier to see when an item is sent to fill a request.

The source code and installation instructions can be found on github here: **Alma_Physical_Addon** .

Set up, Installation and Configuration

User/Account Set Up:

You will need to identify or create an ILL user in your Alma instance that will be the requesting patron. This may be the same or similar to the account used for ILLiad Addon Digitization. This user must have a Job Category of "ILL Staff", a local user group that is allowed to request items from the SCF. Make note of the Primary ID as you will need this for Configuration (see below).

Once you have this user created, please forward the Primary ID to WRLC (kilduff@wrlc.org) so that we can make sure a linked account is created in the SCF. We will also need your return address that will be printed on the slip that will be sent with the item. This should be the same return address that prints on your ILLiad slip.

Installation:

Download and install the Addon in your ILLiad client. See: Installing the ILLiad Client Addon

Configuration:

Configure these settings in the ILLiad client's 'Manage Addons' form:

- ○ ○ Institution Code = 01WRLC_GML (Be sure to use your own code!)
  ○ UserId = this is the Primary ID of the user from “User/Account Set Up”
  ○ IlliadClientSecret = (same secret as Digitization Addon, contact WRLC for secret)

(Main ILLiad → Manage Addons → Select “Alma-Physical-Request Addon”)

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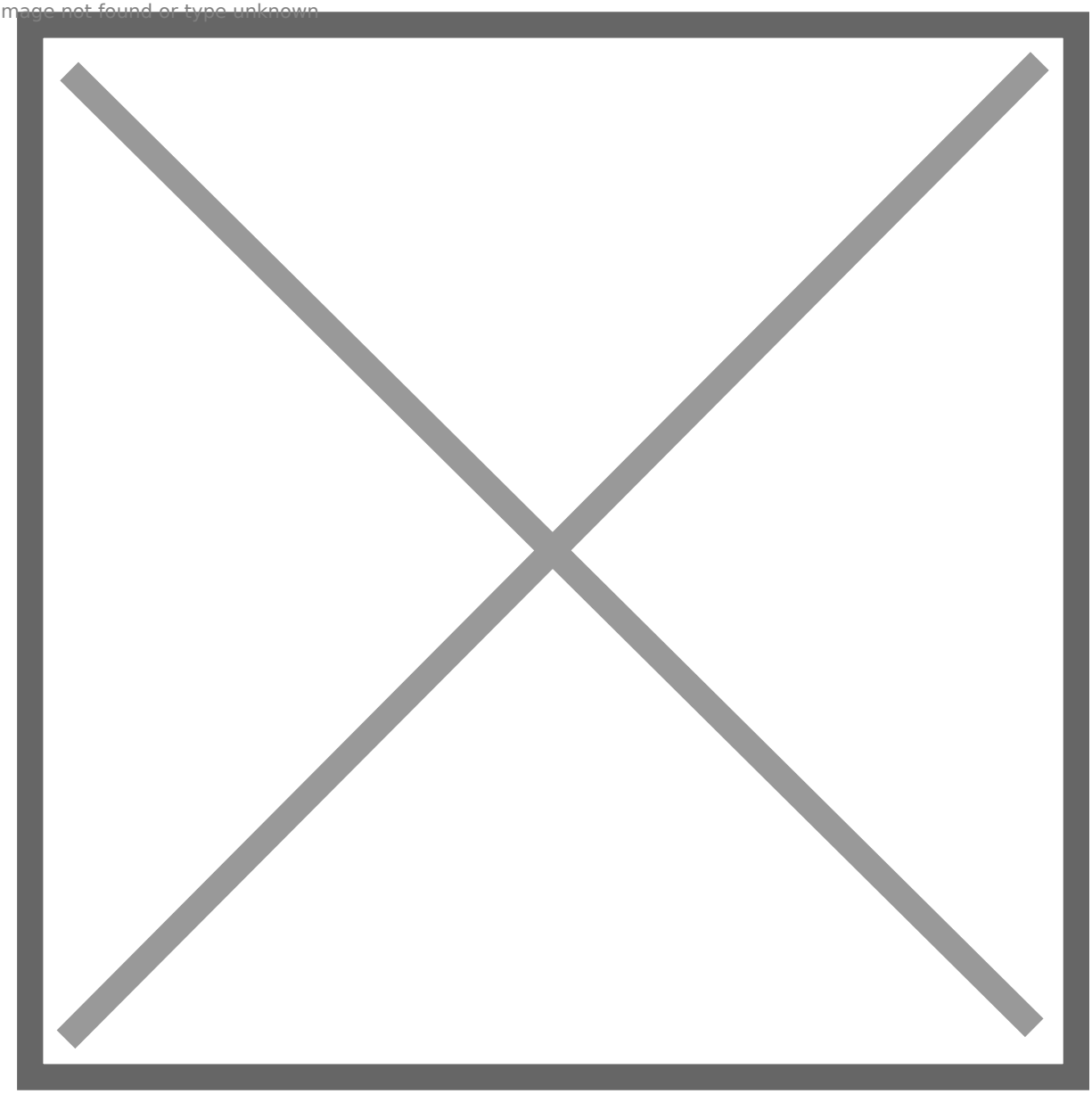

ILL Staff Addon Instructions

1. Once a request has been received in ILLiad for a physical item that is located at the SCF you will need certain item information. You will need to get the item’s “Item ID” and “MMS ID”. This can be accomplished using an Alma Physical item search.

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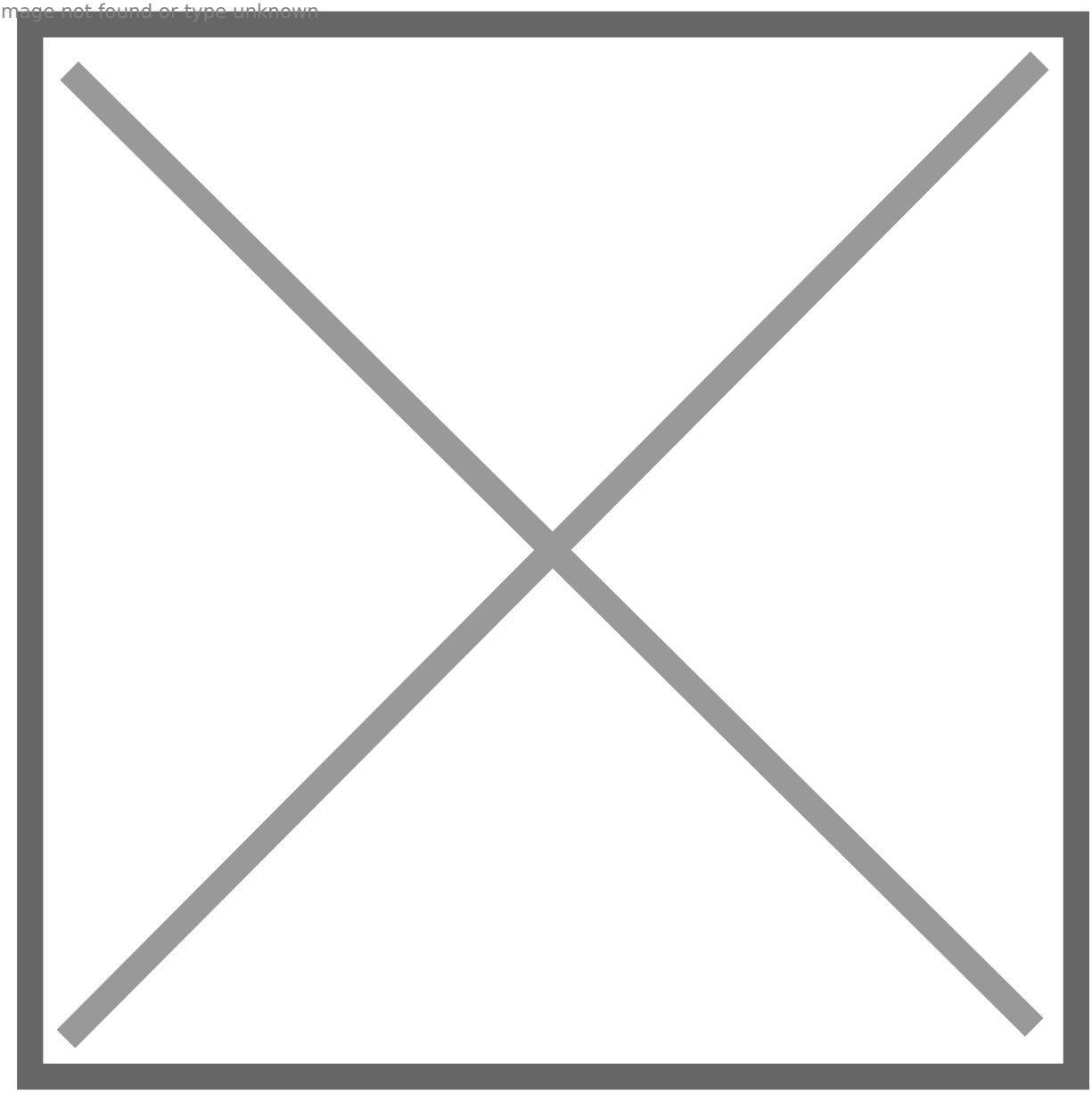

2. These two ID numbers need to be inserted into the ILLiad transaction form. The MMS ID goes in the “Call Number” field, and the Item ID goes under the “Reference Number” field (Reference number is used instead of item number because ILLiad truncated item number to 10 characters, but Alma’s Item IDs can be longer than 10 digits).

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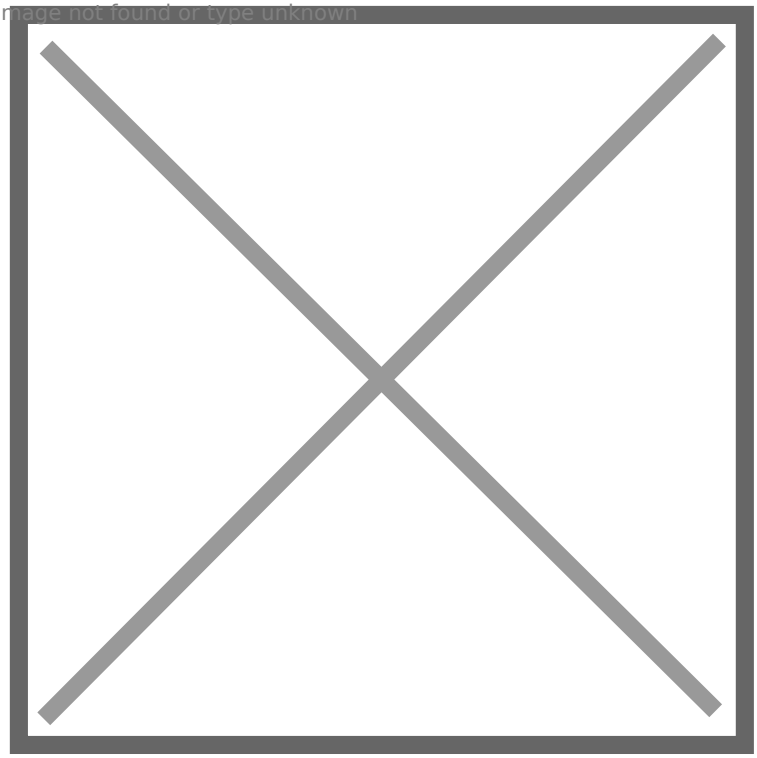

Note: You could also enter the MMS ID and Item ID on the ILLiad Physical Item Request form that is loaded in a following step.

3. Select the WRLC Physical Request plugin tab.

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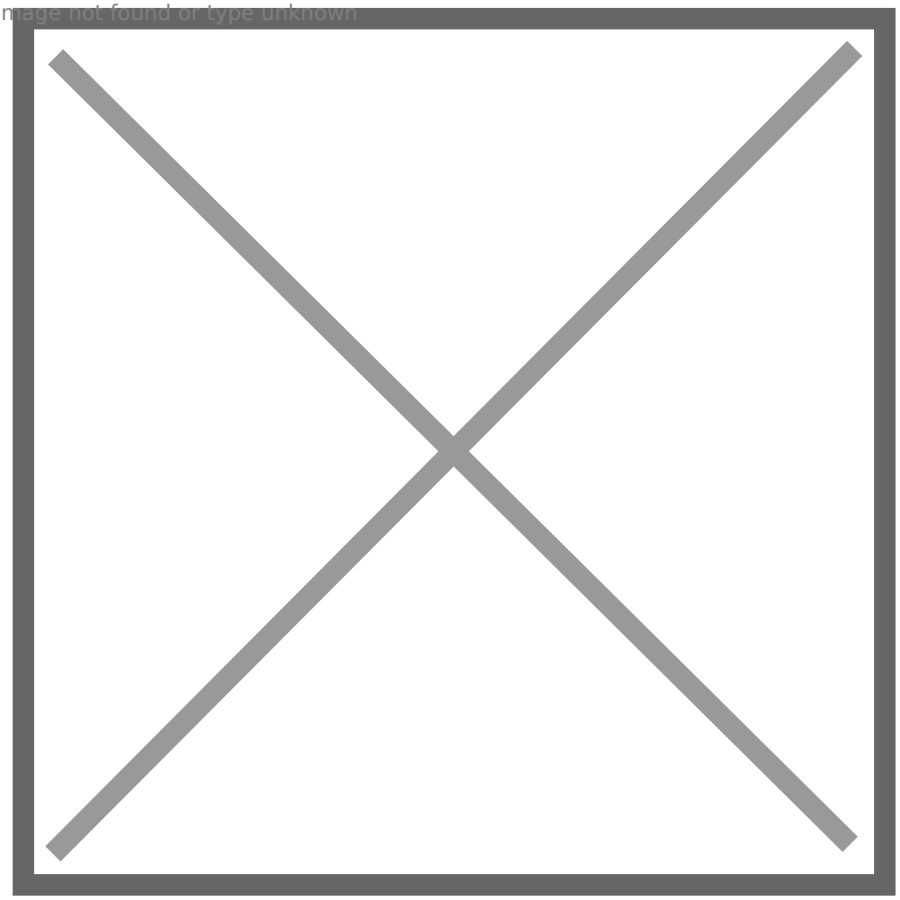

4. Once on the plugin tab, select the Load Request Page button for the WRLC Physical Request form. This will load the form with information pre-populated from ILLIad. You will still need to enter some data.

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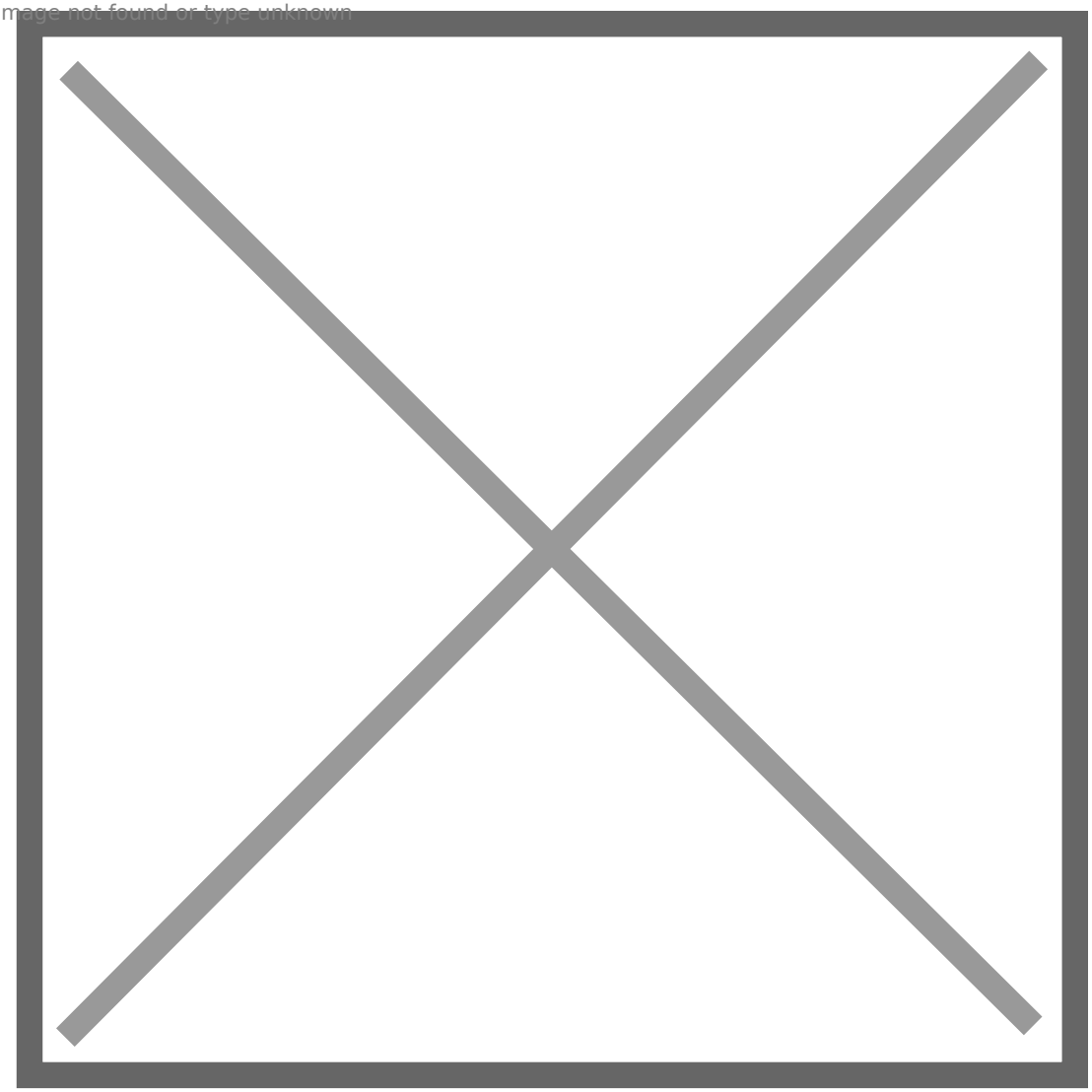

5. The WRLC Physical Request Addon Form

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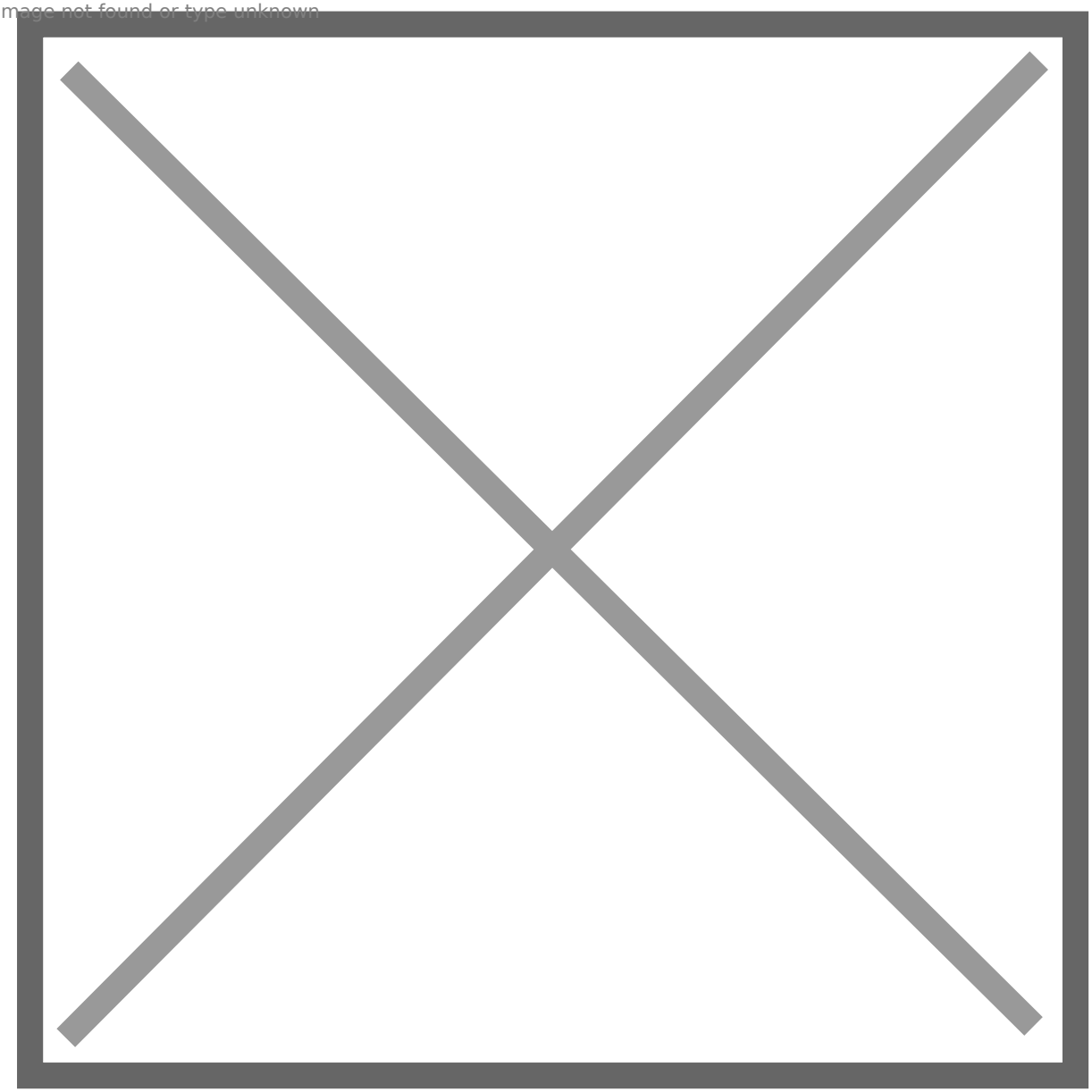

6. You must complete the “WRLC mails item (Y or N)” field.

- ○ ○ Yes
    - ○ ○ WRLC will mail the item if the address information is complete. (We may contact you if there are any questions.)
    - ○ We will insert a pull slip similar to this in the book (see below).
    - ○ We will scan the item in the SCF to put it “in transit” and then scan the item into the owning IZ. (This should put the item on the hold shelf for the requesting ILL patron. This will allow you to see when the item was pulled and sent to the requestor.)
  - ○ No
    - ○ ○ WRLC will scan the item “in transit” and send it to the owning library via the courier.

7. If you did not enter the Item ID and MMS ID in the “Transaction form, then you must do so now. Be sure that both IDs are correct and one or both are not numbers from the original request.

8. All items will have instructions on the Pull Slip to return the item to the owning library. (See example below.)

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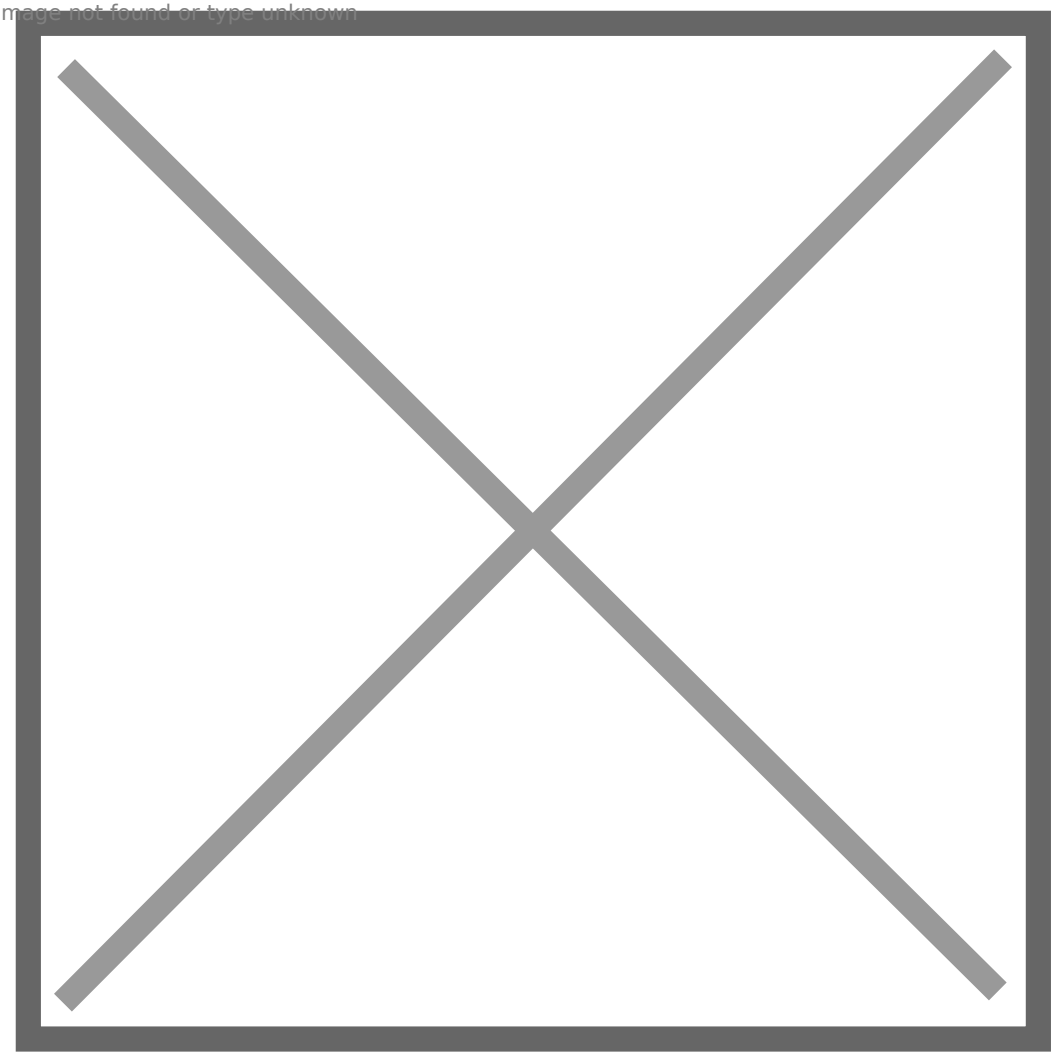

Libraries and Location codes

Partners with Library Names, Pull Slip Codes and Courier Slip Code.

Delivery locations with Codes

Partners with Library Names, Pull Slip Codes and Courier Slip Code

Institution Name (IZ)	Library name	Location Code (Pull Slip)	Courier Slip Code
American University	American University Library	AU	AU
AU, Washington College of Law Library	Pence Law Library	AULAW	AU-WCL
Catholic University of America	Mullen Library	CU	CU
CUA, Columbus School of Law *	Law Library	(CU LAW) *	CU LAW
University of the District of Columbia	Main Library	DC	DC/UDC
UDC, Law School	UDC Law Library	DCL	?
Gallaudet University	Gallaudet University Library	GA	GA
George Mason University Libraries	Fenwick Library	GM	GM
	Mason Square Library	GMA	GM-A
	Mercer Library	GMP	

	Law Library	GMA	GML
Georgetown University	Lauinger Library	GT, GT-OD	GT
	Bioethics Research Library	GT-Bioethics	(GT)
	Blommer Science Library	GTB	(GT)
	School of Continuing Studies Library	GT-SCS	(GT)
	Woodstock Theological Library	GT-WTL	(GT)
GU, Law Library	Georgetown Law Library	GTL	GTL
George Washington University	Gelman Library	GW	GW
	Eckles Library	GWE	MTV
	Virginia Science & Technology Campus	GWN	GW-NVCL
	GW Online-Only Community	GWOC	(GW)
GWU, Himmelfarb Health Sciences Library	Himmelfarb Health Science Library	HI	HI
GWU, Jacob Burns Law Library	Jacob Burns Law Library	JB	GW-JB
Howard University	Founders Library	HU	HU
	Louis Stokes Health Sciences Library	HU-HS	HU-HS

	Law Library	HUWC	HU LAW
Marymount University	Reinsch Library	MU	MU
	Ballston Coakley Library Extension	MUB	MU-B
Shared storage institution	WRLC - Shared Collections Facility	WR	
	Trinity Library (for Trinity Patrons)	TR	TR
Trinity University Washington *	Trinity Main	(TR) *	TR

* Not configured as part of the CLS/AFN Fulfillment Network

Maps and courier routes

Letters managed in the NZ for Physical Item Requests

There are two letters managed in the network zone for our partners.

Pull Slip (Ful Resource Request Slip Letter)

The Pull Slip is managed for our partners to provide consistency for the displayed location codes. These codes are use to direct the physical items to the patron's selected pickup location.

Note: The SCF's Pull Slip has further modifications to allow the letter to be used for ILLiad physical item requests that come to the SCF via the ILLiad Addon. Currently, only GW is using the ILLiad Addon for this purpose. It is not managed in the Network Zone.

On Hold Shelf Letter

The On Hold Shelf Letter is managed in the Network Zone so that specific library instructions can be provided to the patron on when and how material can be picked up. This is due to the use of the "Owning LIbrary's" On Hold Shelf Letter in the Automated Fulfillment Network(CLS).

In the case of a patron requesting an item from their own library for pickup, the "Owning Library's" On Hold Shelf Letter is used.

In the case of a P2P or a Rapido request the requesting patron's Library's On Hold Shelf Letter is used.

wrlc user

Patron accounts with the "wrlc user" user group are patron accounts in an IZ that is not their home IZ. These are often referred to as Linked Accounts.

Linked accounts are created when a patron makes a CLS/AFN request that can be filled by a partner.

wrlc user

Updating a patron's linked account.

Patron linked accounts can be updated in several ways.

- If a patron renews an item on loan from partner institution, the patron's expiry date will automatically be updated to match the expiry date at the home institution.
- If a patron requests a new item from a partner institution, the patron's expiry date will automatically be updated to match the expiry date at the home institution.
- A staff member can manually force an update to a linked patron's expiry date by using "Manage Patron Services".

  Fulfillment --> Checkout/Checkin --> Manage Patron Services --> Patron Services page

  - Select "Find user in other institution", select the appropriate institution.
  - Scan patron's ID or search for patron and select appropriate one.
  - "Find User" (This will force an update to the patron's linked account.