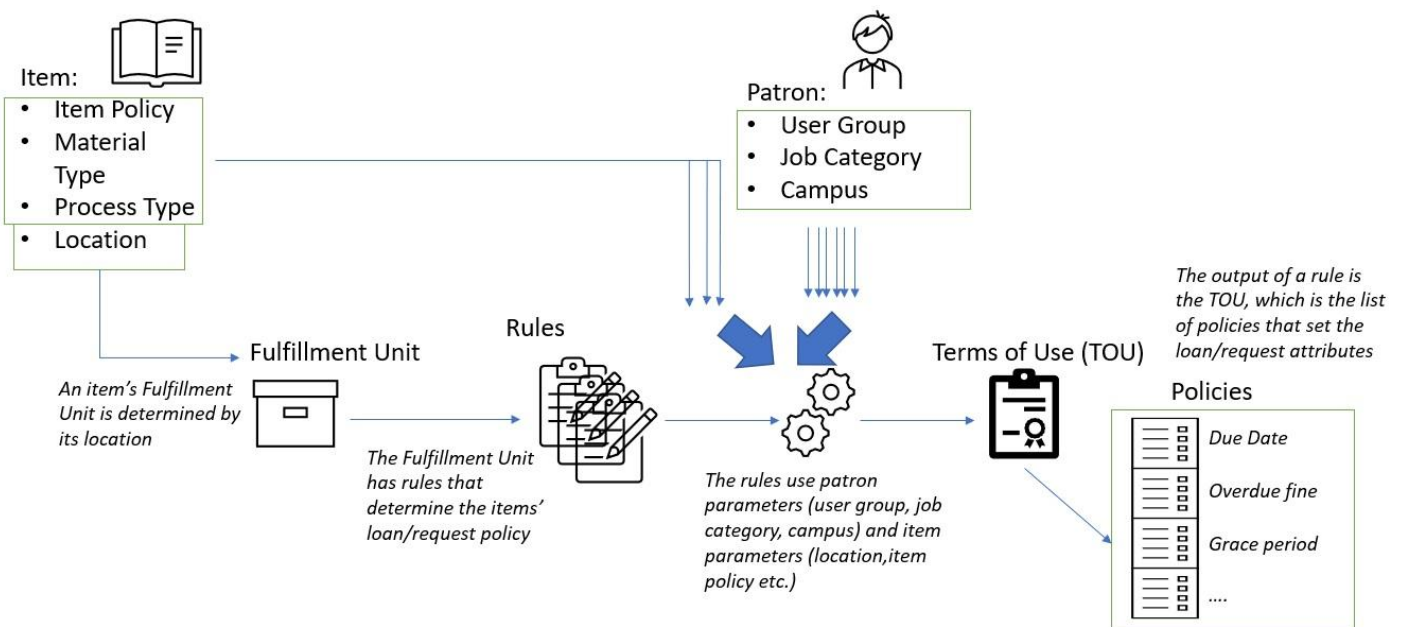


# Fulfillment Units and Fulfillment Rules



In Alma, the **Fulfillment Unit** is the fundamental structural component that governs how items circulate within your institution.

A **Fulfillment Unit** is a logical grouping of one or more **physical locations** within your institution that all share and apply the **same set of circulation policies**.

## Core Components and Their Roles

The Fulfillment Unit acts as a container for the following essential components, which work together to process circulation transactions:

Component	Where to find/configure in Alma	Role in Circulation	Key Details

<a href="#"><u>Physical Locations</u></a>	Configuration > Fulfillment > Locations > Physical Locations *only found when configuring a specific library in your institution)	Defines <i>where</i> an item is physically held.	Each location is linked to a specific library within your institution and is the base for assigning policies. All locations within the same Fulfillment Unit share the same set of rules.
<a href="#"><u>Fulfillment Unit Rules</u></a>	Configuration > Fulfillment > Physical Fulfillment > Fulfillment Units	Determines <i>when</i> and <i>which</i> policy is applied to an item.	Rules evaluate a transaction against specific criteria (parameters) to select the correct TOU. Rules can use criteria based on both the <b>Patron</b> (e.g., user group, job category) and the <b>Item</b> (e.g., location, item policy, material type).
<a href="#"><u>Terms of Use (TOU)</u></a>	Configuration > Fulfillment > Physical Fulfillment > Terms of Use and Policies	Defines the <i>what</i> —the specific circulation policies and parameters.	A group of fulfillment policies organized by <b>type</b> (e.g., Loan, Request, Booking, Resource Sharing). <b>Crucially, each Fulfillment Rule points to exactly one TOU.</b>

## Network Fulfillment Units (Consortial Environments)

In a consortial (shared) environment utilizing the Alma Network Zone (NZ), a **Network Fulfillment Unit** is used to manage circulation policies that apply across multiple institutions, such as consortial loan (CLS/AFN) transactions.

- **Function:** It is possible for an **Institution-only Fulfillment Unit** to incorporate rules from a **Network Fulfillment Unit** (like the 'WRLC Fulfillment Network'). This allows for centralized management of shared policies.
- **Example:** In your consortium, the 'WRLC Fulfillment Network' is the single NZ fulfillment unit containing all rules specific to CLS/AFN transactions.

**Edit Fulfillment Unit** Cancel Save

You are configuring: American University

**General** >

Fulfillment Unit Details | Fulfillment Unit Locations | Fulfillment Unit Rules

Code \* **General** Name \* **General**

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** WRLC Fulfillment Network  Use Network Rules First

WRLC Fulfillment Network

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To configure the use of Network Zone rules in a specific Fulfillment Unit, choose the **WRLC Fulfillment Network** from the drop-down menu in the Fulfillment Unit configuration page, under the option **Use Rules From Network Fulfillment Unit**. Do **not** checkmark 'Use Network Rules First.'

For more information on the rules and TOUs in the WRLC Fulfillment Network fulfillment unit, please see the [Fulfillment Unit](#) section of the [AFN Network Zone Configurations](#) page of the WRLC Alma Wiki.

## Configuring a Fulfillment Unit

Fulfillment Units can be found in **Configuration > Fulfillment > Physical Fulfillment > Fulfillment Units**

The screenshot shows the 'Fulfillment Units List' page. On the left is a vertical navigation menu with icons for Alma Production, Acquisitions, Resources, Discovery, Fulfillment, User Management, Network Zone, and Back. The main content area has a title 'Fulfillment Units List' and a search bar with '1 - 6 of 6' results. A table lists six fulfillment units with columns for Code, Name, Owner, and Description. Each row has a three-dot menu icon on the right. At the bottom right, there is an 'Add Fulfillment Unit' button and a gear icon. The ExLibris logo and copyright notice '© Ex Libris, Part of Clarivate 2025' are at the bottom right of the page.

Code	Name	Owner	Description	
1. Regular	Regular	Institution	Sets rules for jointly owned items at the SCF	...
2. Media	Media	Institution	-	...
3. Closed	Closed	Institution	-	...
4. Limited	Limited	Institution	-	...
5. WRLC-FN	WRLC Fulfillment Network	Network	Sets the rules by which items circulate in the fulfillment network	...
6. LIBRARY-X	Library Delivery Only	Institution	Sets rules for barcodeX items at the SCF	...

\*Please note that Fulfillment Units can be configured for entire institutions, or for specific libraries. Changing the Configuring drop-down menu at the top-left corner of the screen will change your results.

## Creating (Adding) a Fulfillment Unit

1. Go to the **Fulfillment Units List** page.
2. Select **Add Fulfillment Unit**.
3. In the dialog box, enter a **Code** (required, max 10 characters) and a **Name** (required).
4. (Optional) Enter a **Description**.
5. Select an **On shelf request policy** to define how items can be requested when they are available on the shelf (e.g., *Request for pickup anywhere regardless of availability* or *No requesting*).
6. Select **Add Fulfillment Unit** to save the new unit.

## Fulfillment Unit Details

- On the **Fulfillment Units List** page, select the FU's **Code** or choose **Edit** from its row actions list.
- The **Edit Fulfillment Unit** page appears, defaulting to the **Fulfillment Unit Details** tab.
- In this tab, you can modify the general parameters you set during creation: the Code, Name, Description, and the **On shelf request policy**.

- Save your changes. (Further configuration, such as associating **Locations** or defining **Rules**, is done by selecting the corresponding tabs.)

Washington Research Library Consortium

Configuring: Shared Collections Facility

Alma Production

Acquisitions

Resources

Discovery

Fulfillment

User Management

General

Analytics

< Edit Fulfillment Unit

Cancel Save

You are configuring: Shared Collections Facility

Library Delivery Only

Fulfillment Unit Details | Fulfillment Unit Locations | Fulfillment Unit Rules

Code \* LIBRARY-X Name \* Library Delivery Only

Description Sets rules for barcodeX items at the SCF

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 Locations

- On the **Edit Fulfillment Unit** page, select the **Fulfillment Unit Locations** tab.
  - **To Attach Existing Location(s):**
    - Select **Attach Existing Location**.
    - The **Physical Locations List** page appears. Select the location(s) you want to add, then select **Select**.
    - *Note: A location can only be associated with one Fulfillment Unit.*

## Edit Fulfillment Unit

Cancel Save

You are configuring: Shared Collections Facility

## Library Delivery Only

Fulfillment Unit Details Fulfillment Unit Locations Fulfillment Unit Rules

1 - 22 of 22 Code Alt + 2

Attach existing location

Physical Location Type:

	Code	Name	Library Name	Location Type	
1	wrlc	WRLC HQ	WRLC - Shared Collections Facility	Open	...
2	wral	WRLC WCL Storage Restricted	WRLC - Shared Collections Facility	Open	...
3	udc jazz	WRLC UDC Jazz Archives Storage Restricted	WRLC - Shared Collections Facility	Open	...
4	mu arch	WRLC MU Archives Storage Restricted	WRLC - Shared Collections Facility	Open	...
5	wrlc stru	WRLC Storage Restricted	WRLC - Shared Collections Facility	Open	...
6	wrlc stor	WRLC Storage Circulating	WRLC - Shared Collections Facility	Open	...
7	wrlc stnc	WRLC Storage Non-Circulating	WRLC - Shared Collections Facility	Closed	...
8	wrlc ehrr	WRLC Shared periodical	WRLC - Shared Collections	Open	...

For more information on how to create physical locations, please see the WRLC Alma Wiki page [Physical Locations](#).

## Fulfillment Unit Rules

**Fulfillment Unit Rules** are the method for attaching **Terms of Use** (TOU) to a Fulfillment Unit (FU). These rules determine which TOU applies to a specific patron service (Loan, Request, or Booking) based on various criteria.

For more information on how to create TOUs, please see the WRLC Alma Wiki page [Terms of Use \(TOU\)](#).

1. **Access Rules Tab:** Navigate to the **Fulfillment Unit Rules** tab within the "Edit Fulfillment Unit" page.
2. **Select Rule Type:** Choose the type of rule you are configuring: **Booking, Loan, or Request**.

## ← Edit Fulfillment Unit

 Cancel S

 You are configuring: **Shared Collections Facility**

 Name  **Library Delivery Only**

 Fulfillment Unit Details | Fulfillment Unit Locations | **Fulfillment Unit Rules**

 Rule Type 

Institution Rules List

+ Add Rule 📄 ⚙️

Filter: All

Enabled	Move Up	Move Down	Rule Name	Description	Output	Updated By	Update Date	
<input checked="" type="checkbox"/>		▼	Library Delivery Loan	Loan period for pseudo-patrons	Library Delivery Loan	Admin, WRLC	02/26/2025	...
<input checked="" type="checkbox"/>	▲	▼	Fill ILL physical requests	testing	Library Delivery Loan	Kilduff, Katherine	09/15/2020	...
<input checked="" type="checkbox"/>	▲	▼	Faculty Non-circulating	To allow for renewal of pre-re-arch	Faculty Non-circulating	Kilduff, Katherine	09/29/2020	...
<input checked="" type="checkbox"/>	▲		Default Non-circulating	Not loanable to any other user group	Default Non-circulating	Admin, WRLC	09/29/2020	...

Default Rule

📄 ⚙️

Rule Name	Description	Output	Updated By	Update Date	
1. Default loan rule	Default loan rule	Default terms of use	Admin, WRLC	07/22/2020	...

3. **Add a New Rule:** Select **Add Rule** to open the **Fulfillment Unit Rules Editor**.
4. **Define Rule Details:** Give the rule a **Name** (required) and an optional **Description**.
5. **Set Input Parameters:** Define the criteria that must be met for the rule to apply by specifying one or more **Input Parameters**. These are the conditional statements that filter which items or users the rule affects.
  - **Components:** Each parameter is defined by a **Name** (the field to check, e.g., Material Type), an **Operator** (e.g., *equals*), and a **Value** (e.g., *DVD-ROM*).
  - **Possible Parameters** include:
    - **Material Type**
    - **Item policy**
    - **User Group**
    - **Patron Affiliated Campus**
    - **Process Type**
    - **Location** (circulation desk)
    - **Job category** (user role)

6. **Set Terms of Use (Output Parameter):** The rule's output is the **Terms of Use (TOU)** that will be applied if all the input parameters are met. Select the desired TOU from the **Output Parameters** section.
7. **Save:** Select **Save** to store the new rule.

Configuring: Shared Collections Facility

Alma Production

Acquisitions

Resources

Discovery

Fulfillment

User Management

General

Analytics

< Fulfillment Unit Rules Editor

Library Delivery Only

Code LIBRARY-X

Fulfillment Unit Rules Editor

Name \* Faculty Non-circulating

Description To allow for renewal of pre re-arch

Created By Kilduff, Katherine Created On 09/29/2020

Updated By Kilduff, Katherine Updated On 09/29/2020

Input Parameters

+ Add Parameter

Name	Operator	Value
1 Job Category	=	WRLC Faculty
2 User Group	=	wrlc user

Output Parameters

Terms of Use \* Faculty Non-circulating

TOU Details

Add Terms Of Use

8. **Rule Order:** Rules are evaluated from top to bottom. If a rule's input parameters match, its associated **Terms of Use** is applied, and the system stops evaluating subsequent rules. Therefore, specific rules must be placed **before** more general rules. You use the up/down arrows to adjust the order.

For more information on how to configure Fulfillment Units, please see the Alma Knowledgebase page [Configuring Fulfillment Units](#).

## Understanding the Fulfillment Unit Hierarchy

The process of determining the final circulation policy follows a precise hierarchical order, which includes the evaluation of Network rules:

1. **Start with the Location:** When a patron attempts a transaction, Alma first identifies the **Fulfillment Unit** associated with the item's **Physical Location**.
2. **Determine Transaction Type:** Alma immediately filters the relevant policies based on the type of transaction being performed (e.g., Loan, Request, or Booking). This restricts

the evaluation to only the **Fulfillment Rules** associated with that category of **Terms of Use**.

3. **Evaluate Institution Rules:** Alma checks the list of **Fulfillment Rules** configured directly in the **Institution-only Fulfillment Unit**, evaluating them in their configured order.
4. **Evaluate Network Rules:** If no Institution Rule is met, Alma proceeds to evaluate the rules within the **Network Fulfillment Unit** (if one is configured for the Institution's unit). These rules are evaluated in their configured order.
5. **Apply Default Rule:** If no rule in either the Institution or Network unit is met, the system applies the final **Default Rule** at the end of the rule list.
6. **Apply the TOU:** The first **Rule** whose criteria are met (whether Institution, Network, or Default) will be triggered, and its linked **Term of Use (TOU)** will be applied to the transaction (e.g., a 3-week loan).

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