Resource Sharing: Tips & Tricks for Migration to Alma

Alma Workshop, Haifa, 13.12.16

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Main Issues

- Learning Alma
- Policy Changes
- Configuration
- Staff Training
Learning Alma: Sandbox
Online Help
Knowledge Center: Training Videos

Resource Sharing

This course includes the following sessions:
- Resource Sharing
- Resource Sharing ARTEMail and Email
- Resource Sharing Concepts
- Resource Sharing Process Demonstration

Course Duration:
3 hours
Alma Academy & Conference Calls
Basecamp

ALL PROJECTS A-Z

0-9  ⭐️ 972HAI- Alma & Primo Project

A  Alma Resource Sharing UK
Sample Questions

Searching for sharing

All matches by anyone in this project (search all projects).

August 16

Re: RS Lending - Analytics
...pped Digitally) does not delete the request or remove it from Analytics. By default, completed requests are not displayed in the list of Resource Sharing requests in Alma. However, you can view them by changing the Activity Status filter (upper left corner) to "All" or "Completed". Best Regards, Sh...
Project: 972HAI- Alma & Primo Project

Re: RS Borrowing - patron costs
...is received at the library. These fees can be assessed 'automatically' according to the new (July 2016) policies in the Borrowing TOU: Resource Sharing Request Fee and Resource Sharing Receive Fee. These fees can also be assessed/overridden in the Borrowing Request form itself. Best Regards, Shmu...
Project: 972HAI- Alma & Primo Project

July 14

Resource Sharing Lending Reject Letters
Lynne Porat – Hi Shmuel, When we press Reject within the request to send a RS Lending reject letter (to a non-ISO/Alma partner) the message is not sent by email and the status is not updated to Rejected Borrower Request. However, when we manually update the status to Rejected Borrower...
Project: 972HAI- Alma & Primo Project

July 13

Resource Sharing Borrowing Reject Letters
Lynne Porat – Hi Shmuel, When we send Reject letters from the RS drop down menu such as Lost, Non-Circulating etc... the same Cancellation Letter is sent even though we choose different reasons. It seems to be sending Ful Cancel Request Letter which is a standard cancellation letter f...
Project: 972HAI- Alma & Primo Project
Managing Lending Invoices

Customer Value
- Library will enjoy better tracking of costs associated with shipping resource sharing items, by being able to trigger invoices from within Alma

Feature Highlights
- It will be possible to trigger invoices for shipped resources. The invoices will be aggregated and will be reportable in the system.
Alma Users

➢ Send Emails to Alma users abroad
➢ Follow Alma-L/Alma UK Resource Sharing Listservs
Welcome to Ex Libris Idea Exchange! We'd love to hear your ideas for us.
To suggest an idea, please select one of the following forums:

- Alma
- campusM
- Leganto
- Primo
- Rosetta
Sample Ideas

How can we improve Alma?

Enter your idea

Include Fulfillment Notes when Shipping items in Resource Sharing

It would be nice if pop-up fulfillment notes on an item record were attached to a resource sharing request when an item is shipped, much like the barcode currently does. So if a damaged book has a note saying "Underlining noted," that note would attach to the request record so that the borrowing institution could see it. This would make it easier for the people processing on either end to know whether an item shipped with damage, or a set shipped with a certain amount of items, etc.

1 comment - Resource Sharing - Flag idea as inappropriate...

Producing the shipping forms by supplier

Each time a request has been marked "Ship" or "Return", the request details will be collected on a "Shipping Form" (by supplier).

When ready to ship a package -with returned/requested books- to another library, "print form" will:
1. Produce a full detailed form to include with the box
2. Will start a new form for future package.

2 comments - Resource Sharing - Flag idea as inappropriate...
Policy Changes

- **Loan period:** Six weeks for patrons and partners
- **Renewals:** None
- **Resource Sharing Fee:** One fee for all request Types and User Groups
- **ILL requesting via Primo:** enabled for Non-owned, Loaned and Non-Circulating items
- **Patron Renewals/Cancellations** disabled on Primo Library Account
Configuration: Borrowing

**Obligatory:**
- Check Partners’ details/Test communication
- Workflow Profiles
- Terms of Use (TOU) of Loan Periods/No Renewal/Recalls/Overdues
- Opening Hours for Resource Sharing Library
- Patron Query Types
- Resource Sharing Fee

**Non-Obligatory:**
- Shipping Cost Borrowing Rules
- Locate Profiles
- Rota Templates
ILL form in Primo

- Customize stand-alone ILL form in Primo
- Check ILL form with Discovery Tools: Primo Central/EDS/Google Scholar
Requesting via Link Resolver

Fiction and fatalism
Crook, Isaac
Methodist Review, 1905, Vol.87, p.438

Full Text Details Where in the Library / Inter-Library Loan
Open source in a new window

Your search did not match any physical resource in the library
Use the link/s below in order to request the resource from other libraries

Inter-Library Loan for a fee

Having problems? Please contact the staff reference@univ.haifa.ac.il
## Fiction and fatalism

Crook, Isaac  

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<tr>
<th>Full Text</th>
<th>Details</th>
<th>Where in the Library / Inter-Library Loan</th>
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**Resource Information:**

- Citation type: Article
- Journal title: *Methodist Review*
- Publication date: 1905
- Volume: 87
- Issue
- Article title: *Fiction and fatalism*
- Author (Last name, first name): Crook, Isaac
- Scan start page: 438
- Scan end page: 442
- ISSN: 1946-6264

**Delivery Information:**

- Format: Physical
- Comment (PDF file only, salary debit, urgency...):
- Budget Number: (ILS)
- Copyright:
Configuration: Lending

Obligatory:

- Terms of Use (TOU) Loan period/No renewals/Recalls/Overdues
- Shipping Cost Lending Rules
- Workflow Profiles

Recommended:

- Disable Auto-Assign of Lending requests
Staff Training

- Acknowledge the different ways of dealing with change e.g. oppose/ignore/embrace
- Free staff from regular tasks to watch videos
- Demonstrate Alma to staff members & give hands-on activities
- Make sure they read guide and practice workflows
Saving files from Aleph

Obligatory:
- Items On Shelf/Sent to Supplier/On Loan

Recommended:
- Closed requests
- Suppliers’ details
- Statistics (Supplier/Material Type/% Fill Rate/Av. Delivery Time)
- Income/Expenses
General Tips

- **Currently at:** Resource Sharing Desk/Circulation Desk/Digitization Dept.
- **Facets:** Active requests displayed, Completed requests search by keyword
- **Scan-in:** many functions e.g. Transfer to Hold Shelf, In Transit, Re-Shelve and Return
- **Back:** do not press on Browser - must press Cancel/Done/Back/Exit on Alma to get to previous screen
General Tips cont.

- **Slips/Letters:** are sent to a departmental email (depending on Currently at:) and must be printed/forwarded/deleted from there.

- **Reports:** can be printed at departmental printer or sent to an email account.
General Tips cont.

Borrowing:

- **Firefox**: Open Alma with different browser to work on Fulfillment AND RS at same time

- **Payment Vouchers**: print using Ctrl-P (Print Page)

- **Statistical & Financial reports**: use Analytics
General Tips cont.

Lending:

- **Active** requests are arranged by *title of book or article (not journal)!*
- **Digital** requests: print using **Ctrl-P** so that article title appears
- **Invoices:** use Analytics
# Alma Timeline

## 10 months-
- Make list of current ILL processes
- Help prepare Migration form
- Start experimenting with Sandbox

## 9 months-
- Help configure Sandbox and Prod
- Define user Roles
- Correspond with Implementation Team (via Basecamp)
## Alma Timeline cont.

| 8 months- | ➢ Alma Academy  
Participate in: General, Fulfillment/RS and Analytics sessions |
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<tbody>
<tr>
<td>3 months-</td>
<td>➢ Alma Functional Workshop</td>
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</table>
| 1 month-   | ➢ **Recall** all loaned items  
|            | ➢ **Train** staff  
|            | ➢ **Check display** of Borrowing requests in Patron’s **Library Account** and **Loaned Lending items in Primo** |
| 2 weeks-   | ➢ Cease processing **new requests**  
|            | ➢ **Send email notification**  
|            | ➢ **Issue invoices** |
Alma Timeline cont.

| Go Live               | ➢ Update links to **Primo ILL form** on website  
|                       | ➢ Update links to **ILL prices** on website/print ILL forms  
|                       | ➢ Change text on **Loan Slips** (6-week loan)  |
| After Go Live         | ➢ Correspond with EXL **Support** via **Salesforce** cases  
|                       | ➢ Change workflows based on monthly releases |
Remember!

- Don’t expect everything to run smoothly - there will still be many surprises after you Go Live
- With creativity, patience & perseverance you will find solutions to problems
Lastly