

# How to Use ISO Resource Sharing?

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# ISO

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# Introduction

- The "ISO" resource sharing type refers to the International Organization for Standardization (ISO) standard for interlibrary loan transactions
- The ISO resource sharing type enables libraries to participate in resource sharing networks and exchange requests and responses with other libraries complying to the ISO ILL standard. This allows libraries to efficiently request and share resources with each other, streamlining interlibrary loan processes and improving access to materials for patrons.





# Configure Partner

# Configure Partner

In **Alma University** , I am adding **Beitar Partner**

Which both of them agree to work together

Fulfillment > partners > add partners

ExLibris Alma University

All titles Keywords

## Resource Sharing Partner

General Information Contact Information Parameters

Code \*

Profile Type \*

System Type \*

Average Supply Time

Currency

Locate Profile

Supports Borrowing

Supports Lending

New Request Alert

Name \*

Status

Delivery Delay (days)

Alternate Symbol

Enable Direct Charge Functionality

Enable Direct Charge Functionality

# Configure Partner

Parameter Tab :

**Server** : partner's server name (or IP address)

**Symbol**: In ISO the symbol is the Symbol under the Library details of the resource sharing library :

eu01.alma.exlibrisgroup.com/ng/page;u=%2Finfra%2Faction%2FpageAction.do%3FxmlFileName%3Dadministrative\_structure.summary\_ta

Open University Love is Pudding's... google trans תרגום מורפיקס - מ... exlibris Gmail Buttons tools Exlibris tools Envi

Configuring: Resource Sharing Library

### Organization Unit Details

Base URL -

Description: **Temporarily manages inventory that is sent to or received from resource sharing partners**

Premium sandboxes: **0: No Premium SB**

Default location for acquisition

Campus

Proxy

Time to reshelve (hours)

Delay for hold notification (minutes)

Allow other libraries to handle personal delivery

### Resource Sharing Information

Is resource sharing library

Itemless

Symbol: **EXL:DEV1**

### BORROWING SETUP

Cancel request on locate failure

Automatically activate locate profile

Temporarily inactive for borrowing

# Configure Partner

Parameter Tab :

Server : partner's server name (or IP address)

Symbol: In ISO the symbol is the Symbol under the Library details of the resource sharing library :

Port - the partner's ILL port number. If the partner also uses Alma, this is port 9001.

ExLibris Alma University

All titles Keywords

Resource Sharing Partner

Cancel Save

General Information Contact Information Parameters

ALTERNATIVE DELIVERY ADDRESS

Supports ADD Address

GENERAL INFORMATION

Server \*  Port \*

Symbol \*

Request Expiry  No expiry  Expire by interest date  Expiry time

Send requester information

Shared Barcodes

Ignore Lender Shipping Cost

Resending Overdue Days Interval

Beitar

Partner Code: beitar

Profile Type ISO

System Type Alma

# Configure Partner

In **Beitar**, I am adding **Alma University**

Fulfillment > partners > add partners

Users All

Main Library - Main Circulation Desk

### Resource Sharing Partner

Cancel Save

General Information Contact Information Parameters

Code \*  Name \*

Profile Type \*  Status

System Type \*

Average Supply Time  Delivery Delay (days)

Currency  Alternate Symbol

Locate Profile

Supports Borrowing

Supports Lending

New Request Alert

Automatic Claim/Cancel (active only when Resource Sharing Claiming and Cancellation job is active)

Automatic Claim

Automatic Cancel

alma\_university

Partner Code: alma\_university

Profile Type ISO

System Type Alma



# Configure Partner

Parameter Tab :

Server : partner's server name (or IP address)

Symbol: In ISO the symbol is the Symbol under the Library details of the resource sharing library :

Port - the partner's ILL port number. If the partner also uses Alma, this is port 9001.

The screenshot displays the 'Resource Sharing Partner' configuration page in the Alma Production interface. The page is divided into several tabs: 'General Information', 'Contact Information', 'Parameters', 'Notes', and 'Attachments'. The 'GENERAL INFORMATION' tab is currently selected and highlighted with a red box. Within this tab, the following fields are visible:

- Server \***:
- Port \***:
- Symbol \***:
- Request Expiry**:  No expiry  Expire by interest date  Expiry time
- Send requester information**:
- Shared Barcodes**:
- Ignore Lender Shipping Cost**:
- Resending Overdue Days Interval**:

The right sidebar shows the partner details for 'alma\_university':

- Partner Code:** alma\_university
- Profile Type:** ISO
- System Type:** Alma

**Exercise : Add your sandbox as  
a partner**





# Activate Partner from the Community



# How to find partner in the community?

Alma > Fulfillment > Partners > community tab > search name of the library > row actions > copy

The screenshot displays the ExLibris Alma University interface. The top navigation bar includes the ExLibris logo, search filters (All titles, Keywords), and user icons. The left sidebar contains navigation options: Alma Production, Market, Acquisitions, Resources, Fulfillment, Admin, and Analytics. The main content area is titled 'Resource Sharing Partner List'. Below the title, there are tabs for 'Institution' and 'Community', with 'Community' selected. A search bar shows 'Name' and 'haifa'. The table below lists one partner:

<input type="checkbox"/>	Name	Description	Lending Terms	Location Terms	ISO Symbol	Row Actions
1. <input type="checkbox"/>	University of Haifa - The Library (Community)	-	Delivered in 4 days Keep for 70 Cost 0.0 ILS	ALL	IL:HAIFRS	...



Contribute your Library to the  
Community

# How to Contribute my Alma to the Community ?

Alma Configuration > Fulfillment > Resource Sharing Directory Member

The screenshot shows the Alma Configuration interface for 'The YILIS Institute'. The left sidebar contains a navigation menu with the following categories and items:

- Alma Production
- Market
- Acquisitions
- Resources
- Discovery
- Leganto
- Fulfillment** (highlighted with a red box)
- User Management
- General
- Analytics
- Back

The main content area is organized into five columns:

- Library Management**: Opening Hours, Transit Time, Reshelve Without Transit Rules, SIP2 Bin Configuration
- Locations**: Remote Storage
- Physical Fulfillment**: Fulfillment Units, Terms of Use and Policies, Block Preferences, Auto Loan Renewal Rules, Item Policy, Advanced Policy Configuration, Overdue and Lost Loan Profile, Loan Recalls Configuration, Loan Status Name, Request Task Name, Request Cancellation Reasons, Request Pickup Configuration, Self Check Messages, Request Priorities, Scan In Messages Configuration
- Patron Configurations**: User Groups, Patron Limits, Patron User Authentication, Loan Limits, User Block Description, User Block Definitions, User Demerits, Additional Personal Delivery Address Types
- Digital Fulfillment**: Digitization Departments, Electronic Document Delivery Rules, Viewer Labels, Viewer Share Buttons
- Courses**: Processing Departments, Academic Departments, Additional Reading List Citation Statuses, Citation Processing Rules, Course Terms, Citation Attributes Types, Citation Attributes, Citation Attributes To Citation Attributes Types, Locate Citation by Fields, Tags, Tag Mapping, List Subjects, Additional List Subjects, Citation Material Type, Reading List Statuses, Additional Reading List Statuses, Notification types, Test BIB to Citation Normalization, Bibliographic Mapping Rules
- Resource Sharing**: Workflow Profiles, Rota Assignment Rules, Locate Profiles, Shipping Cost Lender Rules, Shipping Cost Borrower Rules, Sending Borrowing Request Rules, Patron Query Templates, Additional Requested Media, Requested Media Definition, Levels of Service, Library Mapping, Brief Audit Fields, Resource Languages, Item Policy Exceptions, Request Form Type by Genre, Borrowing Requests Inactive Filters, Borrowing Request Statuses, Automatic Locate Reject Reasons, Automatic Renew Reject Reasons, ISO General Messages, Shipping Terms of Use
- Discovery Interface Display Logic**: Display Logic Rules, Related Records, Direct Linking, General Electronic Services, General Electronic Services Bib Fields Enrichment, Viewer Services, Online Services Order, General Electronic Services Order, Locations Ordering Profile, Other Settings, Currency Symbols
- General**: Fulfillment Jobs Configuration, Other Settings, Printers, Article Form Mandatory Fields, Book Form Mandatory Fields
- Copyright Management**: Digitization and Copyright Rules, Access Rights, Copyright Declaration, Copyrights Statements - Digital, Digital Watermark, Resource Sharing Copyright Declaration, Copyright Publishers, Citation Default Copyright Status, Leganto Copyright Settings, PPU Non-Funded Agreement, Copyright approval reasons, Copyright reject reasons

In the 'Resource Sharing' column, the path 'Contribute to Resource Sharing Directory' > 'Resource Sharing Directory Member' is highlighted with a red box.

At the bottom of the interface, there is a search bar with the text 'Ctrl+Alt+F to search any menu links'.



# How to Contribute my Alma to the Community ?

Add new member > From Existing Resource Sharing Library > Sava and continue > next > save.

The screenshot shows the 'Edit Resource Sharing Member' page in the Alma Production interface. The page is titled 'Configuring: The YILIS Institute' and has a breadcrumb trail: 'Edit Resource Sharing Member'. The interface is divided into two main sections: 'Member Attributes' and 'Member Address'.

**Member Attributes:**

- Institution Name: The YILIS Institute
- Name: Resource Sharing Library
- Description: (empty)
- Category: (empty)
- Pods I'm part of: (empty)
- Status: Active
- Currency: US Dollar
- Manage request in:  Alma  ILLiad

**Member Address:**

- Address line 1: Library Address
- Address line 2: (empty)
- Address line 3: (empty)
- Address line 4: (empty)
- Address line 5: (empty)
- City: Jerusalem
- State/Province: (empty)
- Postal code: (empty)
- Country: Israel

The interface includes a sidebar on the left with navigation options: Alma Production, Market, Acquisitions, Resources, Discovery, Leganto, Fulfillment, User Management, General, Analytics, and Back. At the top right, there are step indicators (1, 2, 3), a 'Cancel' button, and a 'Next' button.

# Exercise : Contribute your Alma





# Locate Profile



# What is locate Profile?

The "Locate Profile" in Alma allows libraries to define specific rules and parameters for locating and accessing resources from these external systems.

# How to add locate profile?

Alma configuration > Fulfillment > Locate Profile

+Add Locate Profile :

ExLibris Alma University

Configuring: Alma University

## Locate Profiles List

1 - 4 of 4

Name

+ Add Locate Profile

	Name	Description	
1	Demo Server	My demo server	...
2	LOC	Library of Congress	...
3	SWB	SWB Catalogue	...
4	University of Haifa - The Library (Community)	Downloaded from community zone	...

# How to add locate profile?

**Name** : can be anything

**Description** : can be anything

**Type** : in our case Alma

The screenshot shows the 'Locate Profile Details' configuration page in the ExLibris Alma University interface. The page is titled 'Configuring: Alma University' and includes a navigation sidebar on the left with options like Alma Production, Acquisitions, Resources, Leganto, Fulfillment, and Resource Sharing. The main form area contains the following fields:

- Name \***: A text input field containing the value 'Beitar'.
- Description \***: A text input field containing the value 'Beitar'.
- Type**: A dropdown menu with 'Alma' selected.

A red rectangular box highlights the 'Name', 'Description', and 'Type' fields. To the right of the form, there are 'Cancel' and 'Next' buttons, and a progress indicator showing step 1 of 2. A preview pane on the right side of the screen displays the profile details: 'Beitar', 'Description: Beitar', and 'Type: ALMA'.



# How to add locate profile?

**Server** : Beitar's server

**Institution** : Beitar's institution code

**Username and Password** :

ExLibris Alma University

Configuring: Alma University

### Locate Profile Details

1 2 Cancel Back Save

Server \*  Port

Username  Password

Institution \*

Alma Network

Check item availability

Check item requestability

Allow locate by metadata

Locate by fields

Test Connection

Beitar

Description  
Beitar

Type  
ALMA

# How to add locate profile?

We need a **username** and **password** only when the integration profile of the Z39.5 server in Beitar's Alma contains the username and password:

Configuring: The YILIS Institute

## Integration Profile

Cancel Save

General Information Actions Contact Info

EXPORT

User Name

Password

Allow Access

Enrich with Holdings

Enrich with Electronic Inventory

Enrich with Representations

Enrich with Remote Representations

Apply Normalization

Suppress record/s from external search

Enrich with remote storage data

Code: Z39

Integration Type: Z39.50 Server

# Wow to add locate profile?

We put the username and password :

The screenshot shows the 'Locate Profile Details' configuration page in the ExLibris Alma University interface. The page is titled 'Configuring: Alma University' and includes a navigation sidebar on the left with options like Alma Production, Acquisitions, Resources, Leganto, Fulfillment, Resource Sharing, and User Management. The main form contains the following fields and options:

- Server \*:
- Port:
- Username:  (highlighted with a red box)
- Password:  (highlighted with a red box)
- Institution \*:
- Alma Network:
- Check item availability:
- Check item requestability:
- Allow locate by metadata:
- Locate by fields:

At the bottom of the form, a 'Test Connection' button is highlighted with a red box. In the top right corner, a notification banner displays 'Connection Succeeded' with an information icon and a close button. The right sidebar shows the profile details: Description: Beitar, Type: ALMA.



# Wow to add locate profile?

- Select the Check item **availability** check box for the profile to check whether an item is **available** in the institution. An item is available if it's status is **Item in Place**.
- Select the Check item **requestability** check box for the profile to check whether an **item can be requested** as part of a **resource sharing request**.

The screenshot shows the 'Locate Profile Details' configuration page in the ExLibris Alma University interface. The page is titled 'Locate Profile Details' and has a 'Cancel' button and a 'Save' button in the top right corner. The page is divided into two tabs: 'Locate Profile Details' (selected) and 'Locate Profile Parameters'. The 'Locate Profile Details' tab contains the following fields and checkboxes:

- Server \*
- Port
- Username
- Password
- Institution \*
- Alma Network
- Check item availability  (indicated by a red arrow)
- Ignore Electronic and Digital Resources
- Check item requestability  (indicated by a red arrow)
- Allow locate by metadata
- Locate by fields
- Test Connection

# Adding the locate profile to the partner

The screenshot displays the 'Resource Sharing Partner' configuration page in the ExLibris Alma Production system. The page is titled 'Resource Sharing Partner' and includes a 'Cancel' button and a 'Save' button. The 'General Information' tab is active, showing the following fields:

- Code \* beitar
- Profile Type \* ISO
- System Type \* Alma
- Average Supply Time 0
- Currency
- Locate Profile (dropdown menu is open, showing a search bar and a list of options, with 'Beitar - Beitar' highlighted)
- Holdings Code Beitar - Beitar
- Supports Borrowing Demo Server - My demo server
- Supports Lending LOC - Library of Congress
- New Request Alert SWB - SWB Catalogue
- University of Haifa - The Library (Community) - Downloaded from comm

Additional fields on the right side of the page include:

- Name \* Beitar
- Status Active
- Delivery Delay (days) 0
- Alternate Symbol
- Institution Code EXLDEV1\_INST

At the bottom of the page, there are checkboxes for 'Enable Direct Charge Functionality' and 'Automatic Claim/Cancel (active only when Resource Sharing Claiming and Cancellation job is active)'. The 'Automatic Claim' and 'Automatic Cancel' checkboxes are currently unchecked.

# ULI Locate Profile



# ULI Locate Profile

The ULI locate profile covers all library resources but checks at the library level, not the item level. So, if locating fails for a specific library, we can use the ULI profile instead.

The screenshot displays the 'Locate Profile Details' page for the ULI profile. The left sidebar contains navigation options: Alma Production, Market, Acquisitions, Resources, Discovery, Leganto, Fulfillment, User Management, General, Analytics, and Back. The main content area is divided into two tabs: 'Locate Profile Details' (active) and 'Locate Profile Parameters'. The 'Locate Profile Details' tab shows the following configuration:

Username	-	Password	
Institution	ULI-C	Enrich with holdings	Yes
Holdings field	991	subfield	a
Find resource	ULI-C: Union List of Israel - preferred records (based on clustered ULI-V records) via SRU		

The 'Find resource' field is highlighted with a red box. The right sidebar shows the profile details for 'ULI':

- Description: Unified Catalog of Libraries - Israel
- Type: Z39\_50 (highlighted with a red box)

At the bottom of the sidebar, the ExLibris logo and copyright information are visible: © Ex Libris, Part of Clarivate 2024.

# Exercise : Add new locate profile for new partner



# Complete Borrowing and Lending Process – Borrower side



# Complete Borrowing and Lending Process – Borrower side

Why I don't have the borrowing and lending request ?

The screenshot displays the ExLibris Alma University interface. The top navigation bar includes search filters for 'All titles' and 'Keywords', a home icon, a search icon, and a series of utility icons on the right such as a shopping cart, location pin, user profile, and notification bell. A dark sidebar on the left contains main menu categories: Alma, Market, Acquisitions, Resources, Fulfillment, Admin, and Analytics. The 'Fulfillment' category is currently selected. The main content area shows a list of navigation options under the 'Fulfillment' menu, including 'Checkout/Checkin', 'Resource Requests', 'Course Reserves', and 'Resource Sharing'. The 'Resource Sharing' section is highlighted with a red rectangular box and contains the following sub-items: 'Receiving Items', 'Shipping Items', 'Partners', and 'Rota Templates'. Other sections like 'Advanced Tools - Reading Lists' and 'Advanced Tools - General' are also visible in the menu.

# Complete Borrowing and Lending Process – Borrower side

To manage resource sharing borrowing requests, you must have one of the following roles:

**Fulfillment Services Operator / Manager** (in the scope of a resource sharing library)

The screenshot shows the 'User Roles Details' page in the Alma system. The page is titled 'User Roles Details' and has a 'Cancel' button and a 'Save Role' button. The main content area is labeled 'Role information' and contains the following fields:

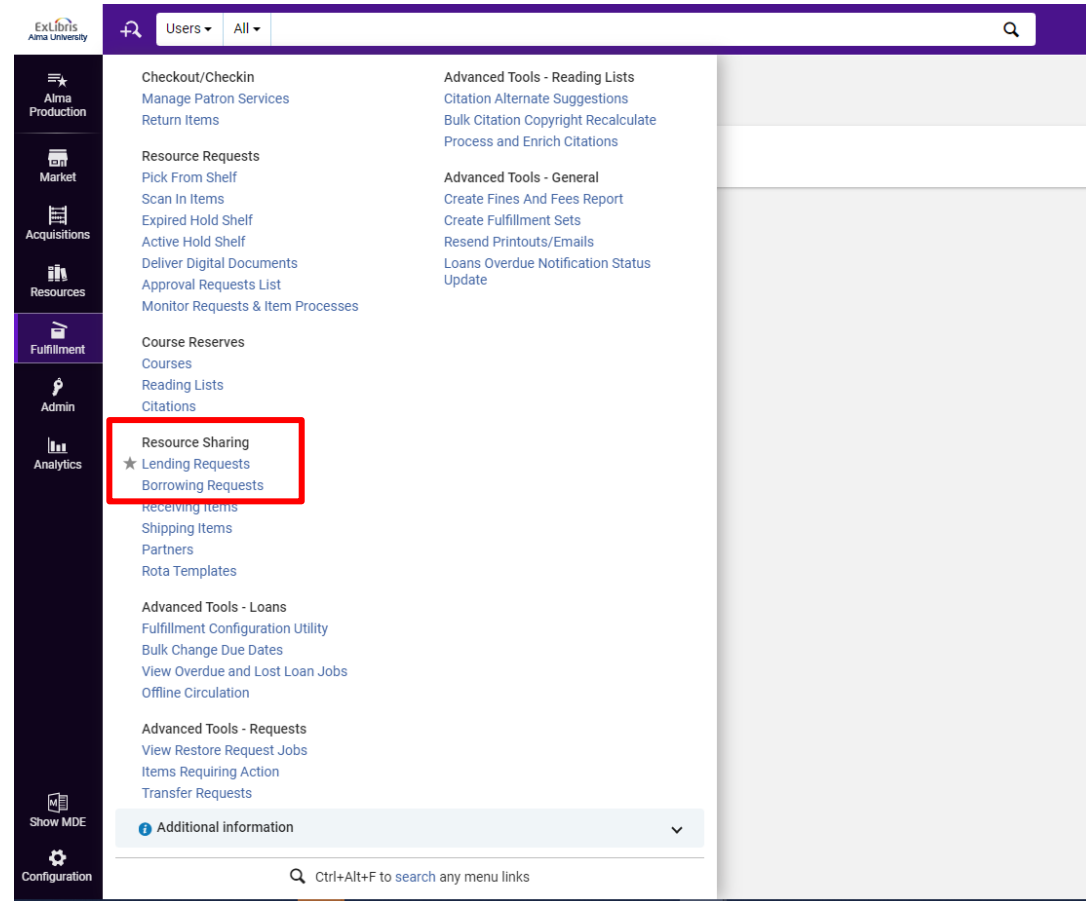
Role name	Fulfillment Services Manager	Scope	Resource Sharing Library
Status	Active	Expiry Date	

The 'Scope' field is highlighted with a red box. The right sidebar shows the user profile for 'Adi Ancelovits' with the following details:

- ID: AdiA613
- Record type: Staff
- Account Type: Internal
- User group: \*
- Identity Service: Not Used

# Complete Borrowing and Lending Process – Borrower side

After adding the role, I am able to view both the lending request and the borrowing request.





# Complete Borrowing and Lending Process – Borrower side

Verify the active letters:

Navigate to Alma configuration > General > Letters > Letters Configuration > Enable the desired letters.

The screenshot shows the 'Letters Configuration' page in the Alma system. The page title is 'Letters Configuration' and it is for 'Alma University'. The interface includes a sidebar with navigation options like 'Alma Production', 'Acquisitions', 'Resources', 'Leganto', 'Fulfillment', 'User Management', 'General', and 'Analytics'. The main content area displays a table of letters with columns for 'Enabled', 'Letter', 'Description', 'Channel', 'Retention Period', 'Customized', 'Patron Facing', 'Updated By', and 'Last Updated'. A red box highlights the first seven rows of the table, which are all marked as 'Enabled'. The 'Enabled' column contains toggle switches, and the 'Customized' column contains green checkmarks for the first seven letters.

Enabled	Letter	Description	Channel	Retention Period	Customized	Patron Facing	Updated By	Last Updated
<input checked="" type="checkbox"/>	Analytics Letter	Analytics Letter	EMAIL		✓		Laur...	21/12/2016
<input checked="" type="checkbox"/>	Borrowed By Letter	Due Items	EMAIL		✓	✓	Mich...	07/12/2015
<input checked="" type="checkbox"/>	Borrower Claim Email Letter	Borrower Claim Email Letter	EMAIL			✓	-	-
<input checked="" type="checkbox"/>	Borrower Overdue Email Letter	Borrower Overdue Email Letter	EMAIL			✓	-	-
<input type="checkbox"/>	Borrower Receive Email Letter	Borrower Receive Email Letter	EMAIL			✓	-	-
<input type="checkbox"/>	Borrower Return Email Letter	Borrower Return Email Letter	EMAIL			✓	-	-
<input checked="" type="checkbox"/>	Borrowing Activity Letter	Patron Circulation Summary	EMAIL		✓	✓	Laur...	26/09/2018
<input checked="" type="checkbox"/>	Change Rapido Request Terms Letter	Change Rapido Request Terms Letter	EMAIL			✓	-	-
<input checked="" type="checkbox"/>	Cloud IdP User Created Letter	Cloud IdP user creation letter	EMAIL			✓	-	-
<input checked="" type="checkbox"/>	Collection Contribution Letter	Collection Contribution Letter	EMAIL				-	-
<input checked="" type="checkbox"/>	Collection Contribution Update Status Letter	Collection Contribution Update Status Letter	EMAIL				-	-
<input checked="" type="checkbox"/>	Conversation Letter	Conversation Letter	EMAIL				-	-
<input checked="" type="checkbox"/>	Courtesy Letter	Courtesy Notice	EMAIL			✓	-	-
<input checked="" type="checkbox"/>	Delivery Registration Status Letter	Delivery Registration Status Letter	EMAIL			✓	-	-

# Complete Borrowing and Lending Process – Borrower side

Borrowing request > Create Request > Manually Book > keywords = 9780816528158 > search

The screenshot displays the Ex Libris Alma University Borrowing Requests interface. The main table lists borrowing requests with columns for checkboxes, book covers, titles, and details. A red box highlights the 'Create Request' dropdown menu, which is open to show options: 'Manually', 'From Search', and 'From External Search'. The 'From Search' option is selected, and a search modal is visible with the ISBN 9780816528158 and external identifier EXLDEV10001983 entered. The right sidebar shows the details of the selected request, including the request form, request information, and notes.

Request ID	Title	ISBN	Requester	Status
1	Havana and other missing fathers by Beitar	9780816528158	Adi Ancelovits	Ready to be sent
2	Glimpses of the Harvard past by Bernard Bailyn	0674354435	Ex Libris Staff	Request sent to partner
3	Glimpses of the Harvard past by Bernard Bailyn	0674354435	Ex Libris Staff	Will supply
4	Verfassungsgerichtsbarkeit in Ungarn : by Drunner, Georg	3789037435	Ex Libris Staff	Request sent to partner
5	The cigarette papers by Stanton A. Glantz	0520205723	Ex Libris Staff	Request sent to partner

# Complete Borrowing and Lending Process – Borrower side

The screenshot shows the Alma University interface for managing borrowing requests. A modal window titled "Resource Sharing Partner List" is open, displaying a table of partners. The table has the following data:

Name	Code	Status	Profile Type
Beitar	beitar	Active	ISO

The "Add Partners" button is highlighted with a red box. The background shows a list of borrowing requests, including titles like "Havana and other missing fathers" and "Glimpses of the Harvard past".



# Complete Borrowing and Lending Process – Borrower side

Now I click on 'locate' to verify whether the partner indeed own this resource."

The screenshot displays the ExLibris Alma University interface. On the left, a sidebar contains navigation icons for Alma Production, Market, Acquisitions, Resources, Fulfillment, Admin, Analytics, Show MDE, and Configuration. The main content area is titled 'Borrowing Requests (1 - 20 of 103)' and lists five items. The first item, 'Havana and other missing fathers' by Beitar, is selected. A modal window titled 'Resource Sharing Borrowing Request' is open, showing a form for 'Resource Information' and 'Request Attributes'. The 'Locate' button in the top right of the modal is highlighted with a red box.

**Resource Information**

Title *	Havana and Other Missing Fathers		
Author		Author initials	
Edition		ISBN	9780816528158
LCCN		System Control Number	
Other standard ID		Barcode	
Remote record ID		Publisher	
Publication date		Place of publication	
Additional person name		Source	
Series title number		Call number	
Note		Volume	
Part		Chapter number	
Chapter author		Chapter title	
Pages		Start page	
End page		Editor	

**Request Attributes**

Specific Edition Only

Requester \* **Adi Ancelovits - AdIA613**

# Complete Borrowing and Lending Process – Borrower side

Now I click on the row action and will send the request to the lender:

The screenshot displays the 'Borrowing Requests' interface in Alma University. The main table lists several requests, with the first one selected. A context menu is open over the 'Edit' button of the first row, and the 'Send' option is highlighted with a red box. The right-hand pane shows details for the selected request, including the book title 'Havana and Other Missing Fathers', ISBN, and the requester's name 'Adi Ancelovits'.

Request ID	Title	Requested	Status	Requester	Created	External Identifier
1	Havana and Other Missing Fathers Beitar	Requested: Book Chapter (Digital) ISBN: 9780816528158 Requester: Adi Ancelovits Created: 07/04/2024 08:57 External Identifier: EXLDEV10001984	Ready to be sent	Adi Ancelovits	07/04/2024 08:57	EXLDEV10001984
2	Havana and other missing fathers Beitar	Requested: Book (Physical) ISBN: 9780816528158 Requester: Adi Ancelovits Created: 04/04/2024 17:04 External Identifier: EXLDEV10001983	Ready to be sent	Adi Ancelovits	04/04/2024 17:04	EXLDEV10001983
3	Glimpses of the Harvard past by Bernard Bailyn Aleph Test Partner	Requested: Book (Physical) ISBN: 0674354435 Requester: Ex Libris Staff Created: 06/08/2021 09:01 External Identifier: EXLDEV10001982	Request sent to partner	Ex Libris Staff	06/08/2021 09:01	EXLDEV10001982
4	Glimpses of the Harvard past by Bernard Bailyn Aleph Test Partner	Requested: Book (Physical) ISBN: 0674354435 Requester: Ex Libris Staff Created: 12/02/2020 14:43 External Identifier: EXLDEV10001978	Will supply	Ex Libris Staff	12/02/2020 14:43	EXLDEV10001978
5	Verfassungsgerichtsbarkeit in Ungarn : by Brunner, Georg Aleph Test Partner	Requested: Book (Physical) ISBN: 3789037435 Requester: Ex Libris Staff Created: 13/02/2020 16:59	Request sent to partner	Ex Libris Staff	13/02/2020 16:59	

# Complete Borrowing and Lending Process - Borrower side

Alma now run the job, and based on the locate result, Alma determines whether to change the status to 'Ready to be sent' or 'Locate failed'.

The screenshot displays the Alma Ex Libris interface for managing borrowing requests. The main area shows a list of requests with columns for item details, requester information, and status. The first request, 'Havana and Other Missing Fathers' (Digital), is highlighted with a red box around its status 'Ready to be sent'. A notification box in the top right corner, also highlighted with a red box, states: 'Job "Manual Locate Job" completed. View job history'. The right-hand pane provides a detailed view of the selected request, including its title, ISBN, requester name, and various request details.

Item	Requested	Requester	Status
Havana and Other Missing Fathers (Digital)	Book Chapter (Digital)	Adi Ancelovits	Ready to be sent
Havana and other missing fathers	Book (Physical)	Adi Ancelovits	Ready to be sent
Glimpses of the Harvard past by Bernard Bailyn	Book (Physical)	Ex Libris Staff	Request sent to partner
Glimpses of the Harvard past by Bernard Bailyn	Book (Physical)	Ex Libris Staff	Will supply
Verfassungsgerichtsbarkeit in Ungarn : by Brunner, Georg	Book (Physical)	Ex Libris Staff	Request sent to partner

# Complete Borrowing and Lending Process - Borrower side

Message : "Sent message successfully"

And the status change to "Request sent to partner"

**Borrowing Requests** (1 - 20 of 104)

Author [ ] Sort by: Update Date [ ]

ID	Title	Requested	Status	Requester	Created	External Identifier
1	Havana and Other Missing Fathers Beitar	Requested: Book Chapter (Digital) ISBN: 9780816528158	Request sent to partner	Adi Ancelovits	07/04/2024 08:57	EXLDEV10001984
2	Havana and other missing fathers Beitar	Requested: Book (Physical) ISBN: 9780816528158	Ready to be sent	Adi Ancelovits	04/04/2024 17:04	EXLDEV10001983
3	Glimpses of the Harvard past by Bernard Bailyn Aleph Test Partner	Requested: Book (Physical) ISBN: 0674354435	Request sent to partner	Ex Libris Staff	06/08/2021 09:01	EXLDEV10001982
4	Glimpses of the Harvard past by Bernard Bailyn Aleph Test Partner	Requested: Book (Physical) ISBN: 0674354435		Ex Libris Staff		

**Sections**

Havana and Other Missing Fathers  
ISBN: 9780816528158  
External identifier: EXLDEV10001984  
Request sent to partner  
Add Label

Request form (as filled by requester)

Email: -      Publication date: -  
Chapter title: -      Chapter number: -  
Chapter author: -      Note: -

Requester: Adi Ancelovits

Request information

Requested format: Digital  
Partner: Beitar



**Exercise : Send borrowing request to your sandbox ( or other partner)**



# Complete Borrowing and Lending Process – Borrower side

# Complete Borrowing and Lending Process – Lender side

Alma University partner should contain locate profile and valid parameters:

**Resource Sharing Partner**

Code \* alma\_university      Name \* alma\_university

Profile Type \* ISO      Status Active

System Type \* Alma

Average Supply Time 0      Delivery Delay (days) 0

Currency      Alternate Symbol

**Locate Profile** \* alma\_university - alma\_university      Institution Code EXLDEV1\_INST

Supports Borrowing       Borrowing Workflow

Supports Lending       Lending Workflow

New Request Alert

Automatic Claim/Cancel (active only when Resource Sharing Claiming and Cancellation job is active)

Automatic Claim

Automatic Cancel

**Resource Sharing Partner**

GENERAL INFORMATION

Server \* https://eu03.alma.exlibrisgroup.com/      Port \* 1900

Symbol \* EXL.DEMO.EU03

Request Expire  No reply  Request by interest date  Expire time

Send requester information

Ignore Lender Shipping Cost

Resending Overdue Days Interval

# Complete Borrowing and Lending Process - Lender side

Alma University should have Digitization Workflow Setup with digitization target

Alma configuration > Fulfillment > Digitization and Copyright Rules > Add rule

Configuring: The YILIS Institute

### Digitization Workflow Rules List

Rules Notes

Institution Rules List

Filter: All Request Type Parameter: All

	Enabled	Move Up	Move Down	Rule Name	Description	Updated By	Update Date	
1	<input type="checkbox"/>		▼	DCS Rule	-	Ancelovits, Adi	07/04/2024	⋮
2	<input type="checkbox"/>	▲	▼	Article Exists From the Same Volume Issue	Article exists from the same volume issue	Staff, Ex Libris	11/02/2020	⋮
3	<input type="checkbox"/>	▲	▼	First Article in Volume Issue for this Course	Auto Approved First Article in volume issue for this course	Staff, Ex Libris	11/02/2020	⋮
4	<input type="checkbox"/>	▲	▼	Same Article Title was Already Requested	Same article title was already requested	Staff, Ex Libris	11/02/2020	⋮
5	<input type="checkbox"/>	▲	▼	Auto Approved Copyright Publication Date	Auto Approved Copyright Publication Date	Staff, Ex Libris	11/02/2020	⋮
6	<input type="checkbox"/>	▲	▼	Auto Approved Copyright Work Percentage	Auto Approved Copyright Work Percentage	Staff, Ex Libris	11/02/2020	⋮
7	<input type="checkbox"/>	▲	▼	Auto Approved Copyright Number of Chapters	Auto Approved Copyright Number of Chapters	Staff, Ex Libris	11/02/2020	⋮
8	<input type="checkbox"/>	▲	▼	Exceed Copyright Work Percentage	Exceed Copyright Work Percentage	Staff, Ex Libris	11/02/2020	⋮
9	<input type="checkbox"/>	▲	▼	Resource Available Electronically	Resource Available Electronically	Staff, Ex Libris	11/02/2020	⋮
10	<input type="checkbox"/>	▲	▼	Chapter Requested for this Resource in Course	Another Chapter is Already Requested From the Same Resource in this Course	Ex Libris	06/11/2016	⋮
11	<input type="checkbox"/>	▲	▼	Same Chapter is Requested in Other Course	Same chapter is requested in other course	Staff, Ex Libris	11/02/2020	⋮
12	<input type="checkbox"/>	▲	▼	Exceed Copyright Limits for this Resource	Exceed copyright limits for this resource	Staff, Ex Libris	11/02/2020	⋮
13	<input type="checkbox"/>	▲	▼	Default Rule - Please Approve Manually	Default Rule - Please approve manually	Staff, Ex Libris	11/02/2020	⋮
14	<input checked="" type="checkbox"/>	▲	▼	ship via link	-	Ancelovits, Adi	07/04/2024	⋮



# Complete Borrowing and Lending Process - Lender side

If the request Type = lending resource sharing digitization request

Select Digitization target = Document delivery - link

Configuring: The YILIS Institute

## Digitization Workflow Setup

Cancel Save

### Digitization Workflow Rule Editor

Name \* **ship via link**

Description

Created By **Ancelovits, Adi** Created On **07/04/2024**

Updated By **Ancelovits, Adi** Updated On **07/04/2024**

### Input Parameters

+ Add Parameter

Name	Operator	Value
1 Request Type	=	Lending resource sharing digitization request

### Workflow Setup

#### DIGITIZED CONTENT MANAGEMENT

Select digitization target **Document delivery - link**

Maximum views **4**

#### APPROVAL/COPYRIGHT CLEARANCE PROCESSING

Approval

Copyright clearance

#### OTHER ACTIONS

Submit CLA/DCS Request

# Complete Borrowing and Lending Process - Lender side

How to config the expiration date link in resource sharing ?

Alma configuration > fulfillment > Other setting > CP document\_delivery\_cleanup\_days

The screenshot shows the Alma configuration interface for 'The YILIS Institute'. The main content area is titled 'Customer Parameters' and contains a table with the following data:

	parameter key	parameter module	parameter value	free text description	Updated By	Last Updated	
1	document_delivery_cleanup_days	fulfillment	30	Number of days for document	-	-	...

The row containing the parameter 'document\_delivery\_cleanup\_days' is highlighted with a red border. The interface also includes a search bar with 'document\_delivery\_clean' entered, a 'Save' button, and a sidebar with navigation options like Alma Production, Market, Acquisitions, Resources, Discovery, Leganto, Fulfillment, and User Management.

# Complete Borrowing and Lending Process - Lender side

Add my Task to home Page

The screenshot shows the Alma library system interface. A 'Manage Widgets' dialog box is open, displaying a list of widgets. The 'Tasks' widget is highlighted with a red box, indicating it is selected. The dialog box has a title bar with a close button (X) and a list of widgets with checkboxes for selection. The background shows the user's home page with a navigation menu on the left and a search bar at the top.

Active	Widget name	Description
<input checked="" type="checkbox"/>	Tasks	Tasks Widget
<input type="checkbox"/>	Notifications	Notifications Widget
<input type="checkbox"/>	Organization Calendar	Calendar Widget
<input type="checkbox"/>	Scheduled Jobs Status	The Scheduled Jobs Status Dashboard widget presents the status of scheduled jobs for the last 5 days
<input type="checkbox"/>	Discovery Search	Primo Dashboard Widget
<input type="checkbox"/>	Consortia Member Links	Consortia Links Widget
<input type="checkbox"/>	Sandbox(es)	Link to the sandbox environment/s that are available for your use

# Complete Borrowing and Lending Process - Lender side

Why the locate failed ?

Change the configuration:

The screenshot shows the configuration page for a Resource Sharing Library. The main content area is titled "Organization Unit Details" and contains several sections:

- LENDING SETUP**
  - Automatically locate resource:
  - Reject request when locate fails:
  - Reject request when no available items:
  - Reject request when no requestable items:
  - Reject request when only electronic available:  [Electronic Rejection Rules](#)
  - Ignore electronic resources:
  - Ignore electronic resources for physical-only requests:
  - Prefer Uresolver locate results:
  - Automatic creation:
  - Temporarily inactive for lending:
  - Default location: Closed Location Type: Lending Resource Sharing Requests
- Locate by fields**
  - Locate only if all fields match:  Yes  No
  - Title:
  - Author:
  - ISBN / ISSN:

On the right side, there is a summary panel for "Resource Sharing Library" with the following details:

- Organization Unit Type: Library
- Code: RES\_SHARE
- Path: EXLDEV1.EXLDEV1\_INST.RES\_SHARE
- Description: Temporarily manages inventory that is sent to or received from resource sharing partners

The interface includes a "Back" button in the bottom left, "Cancel" and "Save" buttons at the top right, and a user profile icon with a help icon in the top right corner.



# Complete Borrowing and Lending Process - Lender side

I will see now 1 Lending request

The screenshot displays the Alma library management interface. At the top, there is a navigation bar with a search bar containing 'All titles' and 'Keywords', and a user profile section for 'Main Library - Main Circulation Desk'. Below the navigation bar, a welcome message reads 'Welcome, Ancelovits, Adi | 07/04/2024'. A 'Recent Pages' section shows 'Lending Requests' under the 'Fulfillment' category. The main content area features a 'Tasks' list with the following items:

- 1 Borrowing Requests
- 1 Lending Requests (highlighted with a red box)
- 1 Failed locate - assigned to you
- 5 Order Lines
- 24 Reading Lists
- 143 Citations

A vertical sidebar on the left contains navigation icons for Alma, Market, Acquisitions, Resources, Discovery, Fulfillment, Admin, and Analytics.

# Complete Borrowing and Lending Process - Lender side

Row actions > ship Item digitally > 2 options :

1.Attached the file and alma will build the link

2.Pase URL

The screenshot displays the Alma Lending Requests interface. On the left, a sidebar contains navigation options such as Alma Production, Market, Acquisitions, Resources, Discovery, Fulfillment, Admin, Analytics, Show MDE, and Configuration. The main area shows a list of Lending Requests, with one request selected: 'Havana and other missing fathers' by 'Resource Sharing Library'. A modal window titled 'Document Delivery' is open, showing details for this request. The modal includes a 'Request ID' field with the value '1/EXLDEV10001983'. Below this, there is a 'Files' section with a 'Shipping Terms of Use' dropdown menu. A red box highlights the 'External file URL (optional)' input field. Below the input field is a dashed box containing the text 'Drop files here, or browse.'.

# Complete Borrowing and Lending Process - Lender side

The shipping outcome in the lender will result:

1. Notification: Digital files have been dispatched.
2. The status will be updated to "Digitally Shipped".

The screenshot displays the Alma Lending Requests interface. The top navigation bar includes the Alma Production logo, search filters for 'All titles' and 'Keywords', and the user's role 'Main Library - Main Circulation Desk'. The main content area shows a list of 'Lending Requests (1 - 1 of 1)'. The first request is for the book 'Havana and other missing fathers' by 'alma\_university', with a status of 'Shipped Digitally' highlighted by a red box. The request details include 'Requested: Book (Physical)', 'Created: 07/04/2024 10:21:09 IDT', and 'External identifier: 1//EXLDEV10001983'. On the right side, a notification box with a green checkmark states: 'Digital files were sent to requester for request 1//EXLDEV10001983'. Below this, another notification states: 'Document delivery handled successfully.' The left sidebar contains navigation options such as 'Market', 'Acquisitions', 'Resources', 'Discovery', 'Fulfillment', and 'Admin'.

# Complete Borrowing and Lending Process – Borrower side

Under task, the borrowing request will be presented.

The screenshot displays the ExLibris Alma University user interface. At the top, there is a navigation bar with the user's name 'Adi Ancelovits' and the date '07/04/2024'. Below this, a 'Recent Pages' section shows 'Borrowing Requests' and 'Partners'. The main content area features a 'Tasks' list with the following items:

- 35 Purchase Requests
- 13 Borrowing Requests
- 9 Returned by patron - unassigned
- 1 Shipped digitally - unassigned** (highlighted with a red box)
- 3 With active notes - unassigned
- 1 Lending Requests
- 35 DARA Recommendations
- 990 Order Lines
- 62 Invoices
- 108 Electronic Resources
- 17 Trials
- 37 Reading Lists
- 357 Citations

The interface includes a sidebar with navigation options: Alma Production, Market, Acquisitions, Resources, Fulfillment, Admin, Analytics, Show MDE, and Configuration. A vertical scrollbar on the right side of the page is visible, with a red box highlighting a portion of the page content.



# Complete Borrowing and Lending Process - Borrower side

I can see file available

The screenshot displays the ExLibris Alma University interface for managing borrowing requests. The top navigation bar includes the ExLibris logo, a search bar with 'Borrowing requests' and 'External Identifier' filters, and a user profile icon with a notification badge showing '35'. The main content area is titled 'Borrowing Requests (1 - 20 of 129)'. A sidebar on the left contains navigation links for 'Alma Production', 'Market', 'Acquisitions', 'Resources', and 'Fulfillment', along with filters for 'Active Partner' (Beitar: 5, None: 1), 'Activity Status' (Active: 106, Completed: 23), and 'Status' (Cancelled By Pa...: 15, Cancelled by sta...: 16, Created borrowin...: 9).

The main list shows a single request for 'Havana and Other Missing Fathers' by Beitar. The request is marked as 'Request Completed' and 'File available'. The request details include: Requested: Book Chapter (Digital), ISBN: 978-0816528158, Requester: Adi Ancelovits, Created: 07/04/2024 15:36, and External identifier: EXLDEV10001988. A 'View' button and a three-dot menu are visible next to the request.

The right sidebar shows the book details for 'Havana and Other Missing Fathers', including the ISBN: 978-0816528158, External identifier: EXLDEV10001988, and the status 'Request Completed'. There is an 'Add Label' button and a 'View' button with a three-dot menu.

# Complete Borrowing and Lending Process – Borrower side

The requester got email to his inbox:

The screenshot shows an Outlook inbox with a selected email titled "Notification Item Letter" from "Your.Department@organization.com" to "Adi Ancelovits". The email content is as follows:

**Notification Item Letter**

07/04/2024  
Adi Ancelovits

Resource Sharing Library  
Resource Sharing Library  
Alma University  
Townsville

Your request to create a digital version of the following material has been completed.  
Title: Havana and Other Missing Fathers  
To download the resource:  
For local/LDAP users click here. <<https://nam10.safelinks.protection.outlook.com/?url=https%3A%2F%2Ffeu03.alma.exlibrisgroup.com%2Fservices%2Flogin%26auth%3Dlocal%26digitalDoc%3D271224580000121%3Anull--EXLDEV10001988&data=05%7C02%7Cadi.ancelovits%40exlibrisgroup.com%7Cc7bed9307C127fa96e00b4429e95f972c2828437a4%7C0%7C0%7C638480966631233663%7CUnknown%7CTWFpbGZsb3d8eyJWljoiMC4wLjAwMDAilCJQjoiV2luMzliLjBtI6lk1haWwiiLjJXVCI6Mn0%3D%7C0%7C%7C%7C&sdata=du0F2WZInmbKVL6pcmjWM3D&reserved=0>>  
For SAML users (add idpCode if needed) click here. <<https://nam10.safelinks.protection.outlook.com/?url=https%3A%2F%2Ffeu03.alma.exlibrisgroup.com%2Fservices%2Flogin%3Dcas%26idpCode%3D%26digitalDoc%3D271224580000121%3Anull--EXLDEV10001988&data=05%7C02%7Cadi.ancelovits%40exlibrisgroup.com%7Cc7bed9303d744eca1a6108dc570e698b%7C127fa96e00b4429e95f972c2828437a4%7C0%7C0%7C638480966631243688%7CUnknown%7CTWFpbGZsb3d8eyJWljoiMC4wLjAwMDAilCJQjoiV2luMzliLjBtI6lk1haWwiiLjJXVCI6Mn0%3D%7C0%7C%7C%7C&sdata=DOjC%2BgyJlQVrVTwzX3o3D&reserved=0>>  
For CAS users click here. <<https://nam10.safelinks.protection.outlook.com/?url=https%3A%2F%2Ffeu03.alma.exlibrisgroup.com%2Fservices%2Flogin%3Finst3DCAS%26idpCode%3D%26digitalDoc%3D271224580000121%3Anull--EXLDEV10001988&data=05%7C02%7Cadi.ancelovits%40exlibrisgroup.com%7Cc7bed9303d744eca1a6108dc570e698b%7C127fa96e00b4429e95f972c2828437a4%7C0%7C0%7C638480966631251718%7CUnknown%7CTWFpbGZsb3d8eyJWljoiMC4wLjAwMDAilCJQjoiV2luMzliLjBtI6lk1haWwiiLjJXVCI6Mn0%3D%7C0%7C%7C%7C&sdata=bW%2B4T1dbW3qFEaKsFEC2BsXm8ABkFSd12A%3D&reserved=0>>

Sincerely  
Circulation Department  
Resource Sharing Library

**Exercise : In your Sandbox  
,handle the lending request  
and ship the item digitally.**





# Document Delivery



# Document Delivery

Alma configuration > Document Delivery Notification Letter > Three Options to login :

The screenshot displays the ExLibris Alma configuration interface for a Document Delivery Notification Letter. The interface is divided into several sections:

- Navigation:** A vertical sidebar on the left contains icons for Alma Production, Acquisitions, Resources, Leganto, Fulfillment, User Management, General, and Analytics.
- Configuration Header:** Shows "Configuring: Alma University" and a dropdown menu.
- Document Delivery Notification Letter:** The main configuration area, including tabs for "Visual" and "HTML", and buttons for "Labels", "Letter Examples", "Cancel", and "Save".
- XSL Editor:** A code editor showing XSL code for conditional rendering based on user type. A red box highlights the following code:

```
<xsl:if test="notification_data/download_url_local != ''">
  <tr>
    <td>@for_local_users@<a>
      <xsl:attribute name="href">
        <xsl:value-of select="notification_data/download_url_local" />
      </xsl:attribute>@click_here@</a>
    </td>
  </tr>
</xsl:if>
<xsl:if test="notification_data/download_url_saml != ''">
  <tr>
    <td>@for_saml_users@<a>
      <xsl:attribute name="href">
        <xsl:value-of select="notification_data/download_url_saml" />
      </xsl:attribute>@click_here@</a>
    </td>
  </tr>
</xsl:if>
<xsl:if test="notification_data/download_url_cas != ''">
  <tr>
    <td>@for_cas_users@<a>
      <xsl:attribute name="href">
        <xsl:value-of select="notification_data/download_url_cas" />
      </xsl:attribute>@click_here@</a>
    </td>
  </tr>
</xsl:if>
<xsl:choose>
```
- Preview:** A visual preview of the notification letter. A red box highlights the download instructions:

Your request to create a digital version of the following material has been completed.  
Title: Havana and Other Missing Fathers  
To download the resource:  
For local/LDAP users [click here](#).  
For SAML users (add idpCode if needed) [click here](#).  
For CAS users [click here](#).  
Sincerely  
Circulation Department
- XML Editor:** A code editor showing the XML structure of the notification letter, including fields like <notification\_data>, <attachments\_list>, <digital\_document\_delivery>, <download\_url\_cas>, <download\_url\_local>, <download\_url\_ncip>, <download\_url\_saml>, <enable\_quick\_print>, <external\_request\_id>, <external\_system>, <general\_data>, and <address\_c>.

# Document Delivery

How to check how your user login to Alma ?

Alma configuration > Fulfillment > Patron User Authentication

ExLibris Alma University | Configuring: Alma University

### Patron User Authentication

Profiles | Login labels

Authentications Profiles

1 - 3 of 3

Active	Code	Display Name	Integration type
1. <input checked="" type="checkbox"/>	Alma	Alma	ALMA
2. <input type="checkbox"/>	LDAP	LDAP Definitions	LDAP
3. <input type="checkbox"/>	social	Social via Alma	SOCIAL_VIA_ALMA

Login Page Help Links

1 - 4 of 4

Active	Code	Label	URL
1. <input checked="" type="checkbox"/>	login.link1	NOT_DEFINED	-
2. <input checked="" type="checkbox"/>	login.link2	NOT_DEFINED	-
3. <input checked="" type="checkbox"/>	login.link3	NOT_DEFINED	-
4. <input checked="" type="checkbox"/>	login.link4	NOT_DEFINED	-

Authentication Settings

- Single Sign Out Upon Timeout
- Enable extending the session
- Enable user setting for extending the session
- Enable Silent Login
- Enable extending the session to maximum

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# Document Delivery

How to check how your user login to Alma ?

If you have SAML , the default's SAML will be in use

ExLibris Alma University

Configuring: Alma University

### Patron User Authentication

Profiles Login labels

Authentications Profiles

1 - 3 of 3

Active	Code	Display Name	Integration type
1. <input checked="" type="checkbox"/>	Alma	Alma	ALMA
2. <input type="checkbox"/>	LDAP	LDAP Definitions	LDAP
3. <input type="checkbox"/>	social	Social via Alma	SOCIAL_VIA_ALMA

Login Page Help Links

1 - 4 of 4

Active	Code	Label	URL
1. <input checked="" type="checkbox"/>	login.link1	NOT_DEFINED	-
2. <input checked="" type="checkbox"/>	login.link2	NOT_DEFINED	-
3. <input checked="" type="checkbox"/>	login.link3	NOT_DEFINED	-
4. <input checked="" type="checkbox"/>	login.link4	NOT_DEFINED	-

Authentication Settings

Single Sign Out Upon Timeout

Enable extending the session

Enable user setting for extending the session

Enable Silent Login

Enable extending the session to maximum

ExLibris  
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# Document Delivery

If you have SAML, the default's SAML will be in use

Alma configuration > integration profile > filter to SAML > find the default one

The screenshot shows the 'Integration Profile' configuration page in the ExLibris Alma system. The page is titled 'Configuring: Training Integration' and has tabs for 'General Information', 'Actions', and 'Contact Info'. The 'SAML DEFINITIONS' section is active, showing various configuration options. A red box highlights the 'Default SAML profile' checkbox, which is checked. Other visible fields include 'Metadata upload method' (set to 'Metadata link'), 'Metadata file link', 'Automatic update', 'ForceAuthn', 'IdP issuer', 'IdP login URL', 'Sign login requests', 'User ID location', 'User ID attribute name', 'IdP logout URL', 'IdP single logout service', 'Sign single logout requests', 'Alma metadata file version', and 'xml SAML response to decrypt'. A sidebar on the left contains navigation icons for Alma Production, Market, Acquisitions, Resources, Research, Discovery, Leganto, Fulfillment, User Management, General, and Analytics. A right-hand panel shows a 'SAML test' section with fields for 'Code SAML' and 'Integration Type SAML'. The ExLibris logo and copyright information are visible at the bottom right of the interface.



# Document Delivery

In our case we have local authentication so remove the unnecessary xsl so now I have only the option of Local user

The screenshot displays the ExLibris Alma University configuration interface for a Document Delivery Notification Letter. The interface is split into two main sections: XSL code editing on the left and a visual preview on the right.

**XSL Code:** The code editor shows XSL snippets. A red box highlights the following code block:

```
<xsl:if test="notification_data/download_url_local != ''">
  <tr>
    <td>@for_local_users@<a>
      <xsl:attribute name="href">
        <xsl:value-of select="notification_data/download_url_local" />
      </xsl:attribute>@click_here@</a>
    </td>
  </tr>
</xsl:if test="notification_data/download_url_saml != ''">
```

**Visual Preview:** The preview shows a notification letter with the following content:

- Language: English | Width: 833px
- Preview header: ExLibris Alma University
- Title: Notification Item Letter | Date: 07/04/2024
- Sender: Adi Ancelovits
- Recipient: Resource Sharing Library, Resource Sharing Library, Alma University, Townsville
- Body text: Your request to create a digital version of the following material has been completed. Title: Havana and Other Missing Fathers. To download the resource: For local/LDAP users [click here](#).
- Signature: Sincerely, Circulation Department
- Footer: Resource Sharing Library
- Footer text: Send example by email adi.ancelovits@exlibrisgr... | Send

A red box highlights the text: "Your request to create a digital version of the following material has been completed. Title: Havana and Other Missing Fathers. To download the resource: For local/LDAP users [click here](#)."

# Document Delivery

To change the “for local/LDAP users” : click on Labels >

The screenshot displays the configuration interface for Document Delivery Notification Letters in the ExLibris Alma University system. The interface is split into two main panes.

**Left Pane (XSL Code):** Shows the XSL code for the notification letter. The code includes conditional logic for local users, such as:

```
<xsl:if test="notification_data/download_url_1">
  <tr>
    <td>@@for_local_users@@<a>
      <xsl:attribute name="href">
        <xsl:value-of select="not
        </xsl:attribute>@click_here@
    </td>
  </tr>
</xsl:if>
<xsl:if test="notification_data/download_url_1">
  <tr>
    <td>@@max_num_of_views@@ <xsl:valu
  </tr>
</xsl:when>
<xsl:choose>
  <xsl:when test="(notification_data/pe
  <tr>
    <td>@@max_num_of_views@@ <xsl:valu
  </tr>
</xsl:when>
</xsl:choose>
<xsl:if test="/notification_data/url_list/stri
  <tr>
```

**Right Pane (Table):** Shows a table of notification items. The table has columns for Enabled, Code, Description, Translation, Updated By, and Last Updated. The item with Code 'for\_local\_users' is highlighted in blue, and its Description 'To login |' is enclosed in a red box.

Enabled	Code	Description	Translation	Updated By	Last Updated
<input checked="" type="checkbox"/>	attached_are_the_urls	Attached are the URLs for the digital re	Attached are the URLs for the digital resources	-	-
<input checked="" type="checkbox"/>	department	Circulation Department	Circulation Department	-	-
<input checked="" type="checkbox"/>	citation_id	Citation ID	Citation ID	-	-
<input checked="" type="checkbox"/>	for_cas_users	For CAS users	For CAS users	-	-
<input checked="" type="checkbox"/>	for_saml_users	For SAML users (add idpCode if neede	For SAML users (add idpCode if needed)	-	-
<input checked="" type="checkbox"/>	for_local_users	To login	For local/LDAP users	-	-
<input checked="" type="checkbox"/>	max_num_of_views	For your information, the maximum nu	For your information, the maximum number of views of the resource is	-	-
<input checked="" type="checkbox"/>	Bcc	None	None	-	-
<input checked="" type="checkbox"/>	Cc	None	None	-	-
<input checked="" type="checkbox"/>	subject	Notification Item Letter	Notification Item Letter	-	-

# Document Delivery

If your users use SMAL , the default user will be in use :

The screenshot displays the configuration interface for Document Delivery Notification Letters in the ExLibris Alma University system. The interface is split into two main panes.

**Left Pane (XSL Code):** Shows the XSL code for the notification letter. The code includes conditional logic for local users and SAML users. A red 'X' is visible over the code, likely indicating an error or warning.

**Right Pane (Table):** Shows a table of notification items. The table has columns for Enabled, Code, Description, Translation, Updated By, and Last Updated. The item with code 'for\_local\_users' is highlighted in blue, and its description 'To login {' is circled in red.

Enabled	Code	Description	Translation	Updated By	Last Updated
<input checked="" type="checkbox"/>	attached_are_the_urls	Attached are the URLs for the digital re	Attached are the URLs for the digital resources	-	-
<input checked="" type="checkbox"/>	department	Circulation Department	Circulation Department	-	-
<input checked="" type="checkbox"/>	citation_id	Citation ID	Citation ID	-	-
<input checked="" type="checkbox"/>	for_cas_users	For CAS users	For CAS users	-	-
<input checked="" type="checkbox"/>	for_saml_users	For SAML users (add idpCode if neede	For SAML users (add idpCode if needed)	-	-
<input checked="" type="checkbox"/>	for_local_users	To login {	For local/LDAP users	-	-
<input checked="" type="checkbox"/>	max_num_of_views	For your information, the maximum nu	For your information, the maximum number of views of the resource is	-	-
<input checked="" type="checkbox"/>	Bcc	None	None	-	-
<input checked="" type="checkbox"/>	Cc	None	None	-	-
<input checked="" type="checkbox"/>	subject	Notification Item Letter	Notification Item Letter	-	-





# Rota Templates



# Rota Templates

Each rota represents a list of potential suppliers, which can be either ordered or unordered.

In an unordered rota, partner checks occur randomly rather than sequentially.

The screenshot displays the 'General Information' form for a Rota Template. The form includes the following fields:

- Code \***: icc\_test
- Name \***: icc\_test
- Type**: Non Ordered (highlighted with a red box)
- Status**: Active

A summary panel on the right side of the form displays the following information:

- icc\_test**
- Name**: icc\_test
- Type**: NON\_ORDERED
- Status**: ACTIVE

# Rota Assignment Rules

# Rota Assignment Rules

Alma configuration > Rota Assignment Rules

ExLibris Alma University

Configuring: Alma University

Copy

## Rota Assignment Rules

Cancel Save

Rota Assignment Rules

Name \*

Description

Created By Ex Libris Created On 07/04/2024

Updated By Ex Libris Updated On 07/04/2024

Input Parameters

+ Add Parameter

Name	Operator	Value
1 Requested Format	=	Digital

Output Parameters

Rota Templates \*

# Rota Assignment Rules

Now, when I create a digital type borrowing request, the rota and the template will be automatically set after saving.

< Resource Sharing Borrowing Request Save and Edit Cancel Save

Title *	A pizza the size of the sun		
Author		Author initials	
Edition		ISBN	A pizza the size of the sun
LCCN		System Control Number	
Other standard ID		Barcode	
Remote record ID		Publisher	
Publication date		Place of publication	
Additional person name		Source	
Series title number		Call number	
Note		Volume	
Part		Chapter number	
Chapter author		Chapter title	
Pages		Start page	
End page		Editor	

Request Attributes

Specific Edition Only

Requester \*

Labels

Owner \*  Request Status

Requested Format  Requested Media



# Rota Assignment Rules

Rota with the partner Beitar

< Resource Sharing Borrowing Request Send Save and Edit Locate Cancel Save

A pizza the size of the sun i >

General Information History **Rota** Parameters General Messages Notes Received Items Attachments

+ Add Partners Move Selected 📄 ⚙️

	Move Up	Move Down	Name	Code	Profile Type	Status	
1	<input type="checkbox"/>		Beitar	beitar	ISO	Active	⋮

# Question from Cases

# Q: Why locate failed , When the item available and requestable?

In the lender > Alma > Fulfillment > Fulfillment Configuration Utility :

The screenshot shows the 'Fulfillment Configuration Utility' interface. At the top, it displays 'Terms Of Use Name: 3 Days Staff Regular'. Below this is a table of 'Terms of Use Policies'. The table has three columns: 'Policy Type', 'Policy Name', and 'Policy Description'. Two cells in the 'Policy Description' column are highlighted with red boxes: 'Requestable for physical resource sharing' (row 3) and 'Requestable for digital resource sharing' (row 9). The interface also includes a sidebar with navigation options like 'Alma Production', 'Acquisitions', 'Resources', 'Discovery', 'Fulfillment', 'Admin', 'Analytics', 'Show MDE', and 'Configuration', and a 'Cancel' button at the top right.

Policy Type	Policy Name	Policy Description
1	Hold Shelf Period	1 Days Hold Shelf Period
2	Is Digitizeable	Not Digitizable
3	Is Requestable for Physical Resource Sharing	Requestable for physical resource sharing Requestable for physical resource sharing
4	Request Priority	Medium
5	On Shelf Request Policy	Use fulfillment unit definition
6	Personal delivery	Personal Delivery - None
7	Is Requestable	Requestable
8	Pickup Locations	Pickup only in owning library
9	Is Requestable for Digital Resource Sharing	Requestable for digital resource sharing Requestable for digital resource sharing
1...	Personal delivery fee	No Personal delivery fee
1...	Automatically convert to resource sharing	Do not convert to resource sharing
1...	Digitization Fee per Digitization	No Fee
1...	Digitization Fee per Page	No Fee

## A: Why locate failed , When the item available and requestable?

The Fulfillment Configuration Utility in resource sharing does not accurately reflect calculations as it does not consider the user name. We must carefully review each fulfillment unit rule to identify and locate the relevant units.



# Q: Why is it that after the lender digitally ships the item, I am unable to see the file in the borrowing request?

The screenshot displays the Ex Libris Alma interface for managing borrowing requests. The top navigation bar includes 'Borrowing requests' and 'External Identifier' search fields. A secondary navigation bar lists various system functions like 'Authority Control Task List', 'Search Resources', and 'Licenses'. On the left, a 'Refine by' sidebar shows filters for 'Activity Status' (Active) and 'Status' (Shipped Digitally). The main content area, titled 'Borrowing Requests (1 - 2 of 2)', shows a single request for a digital article. The request details include the requester 'Test, Another', creation date '03/09/2023 11:14 AM', and external identifier 'TRINTEGRATION0000732'. A red box highlights an empty field in the request details, likely representing the missing digital file. Another red box is visible in the top right corner of the interface.

Request ID	Item	Requested	Requester	Created	External Identifier	Assigned to
1	Testing 123 Support Sandbox EU Shipped Digitally	Article (Digital)	Test, Another	03/09/2023 11:14 AM	TRINTEGRATION0000732	Exlibris, Staff.

# A: Why is it that after the lender digitally ships the item, I am unable to see the file in the borrowing request?

The partner miss the locate profile :

The screenshot shows the 'Resource Sharing Partner' configuration page in the ExLibris Alma system. The page is divided into several sections: 'General Information', 'Contact Information', 'Parameters', 'Notes', and 'Attachments'. The 'General Information' section is active and contains the following fields:

- Code: SUPPSB-EU
- Name: Support Sandbox EU
- Profile Type: ISO
- Status: Active
- System Type: Alma
- Average Supply Time: 5
- Delivery Delay (days): 2
- Currency: (empty)
- Alternate Symbol: (empty)
- Locate Profile: (highlighted with a red box)
- Borrowing Workflow: Borrowing All
- Lending Workflow: Lending

Below the main form, there are checkboxes for 'Supports Borrowing' (checked), 'Supports Lending' (checked), and 'New Request Alert' (unchecked). At the bottom, there is a section for 'Automatic Claim/Cancel' with checkboxes for 'Automatic Claim' and 'Automatic Cancel' (both unchecked).

# Q: Why when we loaned the item from the lender to the requester, the due date for the loan was determined by the RS due date rather than the Term of Use?

The screenshot shows the Alma Patron Services interface. At the top, there is a navigation bar with 'Physical items' and 'Keywords' dropdowns, a search icon, and a 'Resource Sharing Library - Resource Sharing Desk' dropdown. Below this is a secondary navigation bar with various menu items like 'Authority Control Task List', 'Search Resources', 'Licenses', etc. The main section is titled 'Patron Services' and includes tabs for 'Loans', 'Returns', and 'Requests'. A search bar for 'Scan item barcode' is present. Below the search bar, there are 1-3 of 3 search results. The first result is a loan record for 'Seeing Canada /' with a due date of 05/09/2024 5:00 PM and library 'Resource Sharing Library'. The 'Due Date' and 'Library' columns are highlighted with red boxes. On the right side, there are options to 'Send Activity Report', 'Send Requests Report', 'Send Return Receipt', and 'Send Loan Receipt'. There is also a 'User Notes' section and a link to a Google Drive folder.

Title	Due Date	Barcode	Fine	Loan Date	Loan Status	Item Policy	Library	Last Renew Status	Description	Item Call Number	Last Renew Date	Call Number
Seeing Canada /	05/09/2024 5:00 PM	asdd319	-	04/09/2024	Normal	Two Week Loan	Resource Sharing Library	-	-	-	-	-

# A: Why when we loaned the item from the lender to the requester, the due date for the loan was determined by the RS due date rather than the Term of Use?

The fulfillment parameter 'ignore\_lender\_due\_date' (Configuration > Fulfillment > Other Settings) determines if the lender due date in the resource sharing request is used:

If set to 'false' the request due date is used

If set to 'true' then the request due date is ignored, and due date is assigned from the TOU of the temporary item created in the fulfillment process

[https://knowledge.exlibrisgroup.com/Alma/Knowledge\\_Articles/Alma\\_assigns\\_a\\_different\\_due\\_date\\_than\\_the\\_date\\_indicated\\_in\\_the\\_borrowing\\_request\\_when\\_loaning\\_the\\_item\\_to\\_the\\_requestor](https://knowledge.exlibrisgroup.com/Alma/Knowledge_Articles/Alma_assigns_a_different_due_date_than_the_date_indicated_in_the_borrowing_request_when_loaning_the_item_to_the_requestor)

Configuring: Training Integration

### Customer Parameters

Save

Values Notes

1 - 1 of 1 parameter key ignore\_lender\_due\_date

parameter key	parameter module	parameter value	free text description	Updated By	Last Updated
ignore_lender_due_date	fulfillment	false	Setting this flag to Yes will ignore ler	-	-

Customer Parameters

Table Description  
Customer Parameters

Customization mode:  
Specific rows can be customized





# Think forward™

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## About Clarivate

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