Resource Sharing in Alma

Moshe Shechter | Alma Product Manager
Introductions

• Moshe Shechter
  Alma Product Manager

With Ex Libris for 15 years. After a couple of years on the Aleph development team, I joined the Alma team in 2010 as business analyst and later as product manager.

My focus is in Fulfillment, Resource Sharing, User Management and Integrations.
Objectives and Target Audience

• By the end of this session, you will:
  • Get a glimpse of Alma resource sharing workflows
  • Gain an understanding of resource sharing processes and how they fit scenarios at your library
  • Understand the basic configuration elements that make up Alma resource sharing

• Session Target Audience:
  • Resource sharing library staff, administrators, and technical people, new to Alma resource sharing
Basic Terminology and Configuration Elements
Basic Terminology

• When setting up resource sharing, we will always be setting up configuration that describes
  • ‘My’ side of the process
  • The ‘other’ side of the process
Basic Terminology

• For workflows in which I am the borrower:
  • ‘My’ side of the process is the borrower side
  • The ‘other’ side of the process is the lender side

• For workflows in which I am the lender:
  • ‘My’ side of the process is the lender side
  • The ‘other’ side of the process is the borrower side

• Any library may be implementing only a borrower workflow or only a lender workflow. Still, both the ‘my’ and the ‘other’ side must be configured
Basic Terminology

• Some coordination is required between how the ‘my’ and the ‘other’ side is configured in my Alma system and how the ‘my’ and the ‘other’ side is configured at the peer (Alma or other) library.
Configuration Elements

The ‘My’ Side
The Resource Sharing Library

• The ‘My’ side is the Resource Sharing Library. It owns:
  • The borrowing requests I manage as borrower
  • The lending requests I manage as lender
In order for staff to be able to view and monitor ‘my’ borrowing and lending requests, their user account must be linked to a Fulfillment Services Operator role, at the scope of the resource sharing library.
In order for patrons to be able to place borrowing requests, they must be linked to one or more resource sharing library(ies)
The Resource Sharing Library

- An institution may manage a single resource sharing library, where all borrowing and lending requests are managed.

- An institution may manage one resource sharing library per every campus.

- An institution may manage every ‘regular’ library as a separate resource sharing library (e.g. the main library, the humanities library etc.).

- An institution may manage one resource sharing library for a group of libraries (one for the law library and one for the rest of the institution).
The Resource Sharing Library

- The resource sharing library has relations with other libraries, determining:
  - In what libraries the items requested for borrowing may be picked up
  - What libraries items may be taken from and shipped in order to fulfill a lending request
### Resource Sharing Fulfillment Unit

**Code:** RES_FU

#### Fulfillment Unit Rules Editor

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>Created By</td>
<td>Ex Libris</td>
</tr>
<tr>
<td>Created On</td>
<td>10/04/2018</td>
</tr>
<tr>
<td>Updated By</td>
<td>Ex Libris</td>
</tr>
<tr>
<td>Updated On</td>
<td>10/04/2018</td>
</tr>
</tbody>
</table>

#### Input Parameters

No records were found.

#### Output Parameters

- Resource Sharing Partner
- User Group
# Resource Sharing TOU – Borrowing

## Terms of Use Confirmation

You are configuring: Resource Sharing Library

## Default terms of use

**Description**
Default No Outgoing Resource Sharing Requests To...

<table>
<thead>
<tr>
<th>Policy Type</th>
<th>Policy Name</th>
<th>Policy Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Allow Resource Sharing Requesting</td>
<td>Resource Sharing Allowed</td>
</tr>
<tr>
<td>2</td>
<td>Resource Sharing Receive Fee</td>
<td>5</td>
</tr>
<tr>
<td>3</td>
<td>Resource Sharing Request Fee</td>
<td>8</td>
</tr>
<tr>
<td>4</td>
<td>Renew Fee</td>
<td>No Renewal Fee</td>
</tr>
<tr>
<td>5</td>
<td>Active resource sharing requests limit</td>
<td>No Resource Sharing Limit</td>
</tr>
<tr>
<td>6</td>
<td>Yearly resource sharing requests limit</td>
<td>No Yearly Resource Sharing Requests Limit</td>
</tr>
<tr>
<td>7</td>
<td>Pickup Locations</td>
<td>Pickup In Library</td>
</tr>
<tr>
<td>8</td>
<td>Personal delivery</td>
<td>Personal Delivery - All</td>
</tr>
<tr>
<td>9</td>
<td>Personal delivery fee</td>
<td>Personal Delivery Fee - No Fee</td>
</tr>
</tbody>
</table>
Resource Sharing TOU - Lending

Fulfillment Unit Rules Editor

Name *
Description

Created By Ex Libris
Updated By Ex Libris
Created On 10/04/2018
Updated On 10/04/2018

Input Parameters

Output Parameters

Terms of Use *

No records were found.

Name:

- Look-up or select
- Item Policy
- Location
- Material Type
- Resource Sharing Partner
### Terms of Use Confirmation

You are configuring: Resource Sharing Library

**Lending resource sharing**

**Description**
- 

<table>
<thead>
<tr>
<th>Policy Type</th>
<th>Policy Name</th>
<th>Policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Due Date</td>
<td>2 week Loan</td>
<td>-</td>
</tr>
<tr>
<td>2 Maximum Renew Date</td>
<td>Maximum Renew Date - None</td>
<td>Does</td>
</tr>
<tr>
<td>3 Resource Sharing Recall Period</td>
<td>3 day recall period</td>
<td>-</td>
</tr>
</tbody>
</table>
The Libraries (Policies)
## The Libraries (Policies)

### 1 day Staff Limited

**Description**

1 day Staff Limited

<table>
<thead>
<tr>
<th>Policy Type</th>
<th>Policy Name</th>
<th>Policy Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Is Requestable</td>
<td>-</td>
</tr>
<tr>
<td>2</td>
<td>Pickup Locations</td>
<td>Pickup only in owning library Must pickup in owning library</td>
</tr>
<tr>
<td>3</td>
<td>Hold Shelf Period</td>
<td>7 day Hold Shelf Default value for HoldShelfPeriod</td>
</tr>
<tr>
<td>4</td>
<td>Is Digitizeable</td>
<td>Is Digitizable -</td>
</tr>
<tr>
<td>5</td>
<td>Is Requestable for Resource Sharing</td>
<td>Not Requestable For Resource Sharing</td>
</tr>
<tr>
<td>6</td>
<td>Request Priority</td>
<td>Pickup Low -</td>
</tr>
<tr>
<td>7</td>
<td>On Shelf Request Policy</td>
<td>Use fulfillment unit definition Use fulfillment unit definition</td>
</tr>
<tr>
<td>8</td>
<td>Personal delivery</td>
<td>Personal Delivery - None Do not deliver items at all</td>
</tr>
<tr>
<td>9</td>
<td>Personal delivery fee</td>
<td>Personal Delivery Fee - No Fee Personal delivery is not charged with a fee</td>
</tr>
</tbody>
</table>
The Libraries (Policies)

Manage Resource Options

- Some of the existing physical inventory may not be used for fulfilling resource sharing requests due to library policies.

Create Request

- No items available for the request due to policy.
Configuration Elements

The ‘Other’ Side
The Partner Record

• The ‘other’ side is the partner record. It defines:
  • How the other side will be contacted, by defining:
    • The **Profile Type** (ISO/Email/SLNP/NCIP)
    • The partner’s **Parameters**
  
  • How the locate process will be run, by defining:
    • The **Locate Profile** to use
    • The **Holdings Code**
  
  • How the workflow will be managed, by defining:
    • Whether the partner **supports borrowing and lending**
    • **Borrowing and Lending Workflow Profiles**
The Partner Record

• The partner record may represent an ‘other side’ institution, or any subdivision of the ‘other side’ institution:
  • A specific library
  • A group of libraries
  • A campus

• This may be done by setting up the Holdings Code to match the code at the ‘other side’
The Partner Record

- Partner represents an ‘other side’ institution:

There is no Holdings Code
The Partner Record

- Partner represents an ‘other side’ library:

  Configuration at my institution

  The Holdings Code on the partner record matches a library code at the other institution

  Configuration at the institution I want to borrow from or lend to
The Partner Record

• Partner represents an ‘other side’ campus:

- The Holdings Code on the partner record matches a campus code at the other institution

Configuration at my institution

Configuration at the institution I want to borrow from or lend to
The Partner Record

- Partner represents a number of ‘other side’ libraries:

  Configuration at my institution

  The Holdings Code on the partner record matches a mapped code to library codes at the other institution

  Configuration at the institution I want to borrow from or lend to
The Partner Record

- The list of partners is managed at the institution level
- Members of a Network Zone Collaborative Network may centrally manage the list of partners in the Network Zone. A job distributes the partners list to the member institutions.
The Partner Record

- Partner
- Integration Type
- Locate Profile
- Workflow Profile

- Email
- ISO
- ARTEMail
- SLNP
- NCIP P2P
- BLDSS
- Fulfillment Network

- Alma
- Z39.50
- BLDSS
- Fulfillment Network
The Partner Record

Borrower Institution

Request

Temporary Item

Loan

Partner Integration Type

Rota

1

Partner Locate Profile Workflow Profile

Integration Type

2

Partner Locate Profile Workflow Profile

Integration Type

3

Partner Locate Profile Workflow Profile

Integration Type
The Partner Record

- Request
  - Item Moved to Temporary Location
  - Partner Integration Type
  - Workflow Profile

Lender Institution
Locate Profiles:

- Define how to locate the resource in the partner’s catalog

Locating Process:

- Locate the resource in partners’ catalogs
- Partners that cannot fulfill the request are removed from the request’s rota
## Locate Profiles

### Locate Profile Details

<table>
<thead>
<tr>
<th>Description</th>
<th>Type</th>
<th>ALMA</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Trainig Institution</strong></td>
<td>My Self</td>
<td></td>
</tr>
</tbody>
</table>
The Locate Process
The locate process may be manually activated from the request’s edit form or from the task list, if the request has assigned rota.
The locate process is actually a background job that runs search queries against all of the partners in the rota, as per the definitions of the locate profiles. The locate process may take some time to complete.
The Locate Process – Borrower

- For **Z39.50 locate profiles**, Alma triggers a Z39.50 query as per the locate profile definitions. One or more matching results is considered a success.
The Locate Process – Borrower

- The **Alma locate profile** search depends on the metadata that is known at the borrowing side.

> Lender and requester do not share the same Network Zone or the same Fulfillment Network. The locate process then depends on the locate profile setup.

- If the **Locate By Fields** sub-fields are selected to define which fields are to be searched, these fields will be used for the locate process.
The locate process may be triggered manually using the **Locate** action
The Locate Process – Lender

• The locate process will succeed if there is a single match, and it will fail if there is more than one match or if there are no results. In either failure case, the search query will be displayed, and the operator will be able to manually attach the lending request to the local repository or change the search query.
The Locate Process – Lender

• If the request has been received with a record ID (based on NZ or shard Primo search), the lending request will be automatically linked to the identified record.

• If the request has not been received with a record ID, the Locate By Fields configuration in the resource sharing library is used to locate the record.

• If there is no Locate By Fields configuration specified in the resource sharing library, the following fields will be used, in the order they are listed below:
  • LCCN
  • OCLC Number
  • Title + ISBN/ISSN
The Locate Process – Self Ownership

• The process of determining self-ownership is similar to the lending locate process, taking the following into considerations:
  ✓ The **Locate By Fields** configuration in the resource sharing library
  ✓ If there is no **Locate By Fields** configuration in the resource sharing library, the following fields will be used, in the order they are listed below:
    - LCCN
    - OCLC Number
    - Title + ISBN/ISSN

Note that self-ownership when checked at the Primo GetIt tab is based on the resolving of the incoming OpenURL to an existing resource, and is therefore based on the resolver’s matching mechanism rather than the above mentioned configurations.
User Roles

• **Resource Sharing Partners Managers** may *configure* resource sharing partners and rota templates

• **Fulfillment Services Operators or Managers** may *receive* and *supply items* and *manage borrowing and lending requests*

• **Fulfillment or General System Administrators** may *configure* general resource sharing related configurations (assignment rules, workflows etc.)
Peer to Peer Workflows
Resource Sharing in Alma

**BORROWER**
- Institution
- Resource Sharing Library

**LENDER**
- Institution
- Resource Sharing Library

Stub item – owned by resource sharing library
Resource Sharing in Alma
Item Creation Rules
Item Creation Rules

Temporary Item Creation Rule

- **Name**: Borrowing RS 2
- **Created By**: Ex Libris Support
- **Created On**: 04/05/2015
- **Updated By**: Ex Libris Implementer
- **Updated On**: 05/10/2015

**Input Parameters**

<table>
<thead>
<tr>
<th>Name</th>
<th>Operator</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resources Sharing Partner</td>
<td>In List</td>
<td>ILL, TEST, ILL TEST 2015, ILL Text, ILLAND, II Test</td>
</tr>
<tr>
<td>Circulation Desk</td>
<td></td>
<td>Resource Sharing Desk</td>
</tr>
<tr>
<td>Days Until Due Date</td>
<td>Less than</td>
<td>9</td>
</tr>
</tbody>
</table>

**Output Parameters**

- **Location**: Borrowing Resource Sharing Requests
- **Value**: Item Policy, ILL Loan - Long
Item Creation Rules

Temporary Item Creation Rule:
- Name: Summit3 Long Loan (67 days)
- Created By: OmFOY2Nh09y_TWjjoOvab6U+Q29ycmlu
- Created On: 14/01/2015
- Updated On: 14/01/2015

Temporary Item Creation Rule:
- Name: Summit3 Short Loan (25 days)
- Created By: OmFOY2Nh09y_TWjjoOvab6U+Q29ycmlu
- Created On: 14/01/2015
- Updated By: OmFOY2Nh09y_TWjjoOvab6U+Q29ycmlu
- Updated On: 14/01/2015

Input Parameters:
- Days Until Due Date: 30

Output Parameters:
- Location: Summit 3 Short
- Item Policy: Summit Short Loan
Item Creation Rules
### Item Creation Rules

#### Resource Sharing Circulating Material

<table>
<thead>
<tr>
<th>Code</th>
<th>RES_FLU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Summit 3 Long</td>
</tr>
<tr>
<td>Description</td>
<td>Summit 3 Long</td>
</tr>
<tr>
<td>Created By</td>
<td>RVVhcmRvcmlZm, V6hWBFz Qw***</td>
</tr>
<tr>
<td>Updated By</td>
<td>RVVhcmRvcmlZm, V6hWBFz Qw***</td>
</tr>
<tr>
<td>Created On</td>
<td>08/01/2015</td>
</tr>
<tr>
<td>Updated On</td>
<td>08/01/2015</td>
</tr>
</tbody>
</table>

#### Input Parameters

<table>
<thead>
<tr>
<th>Name</th>
<th>Operator</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td></td>
<td>Summit 3 Long</td>
</tr>
</tbody>
</table>

#### Output Parameters

<table>
<thead>
<tr>
<th>Terms of Use</th>
<th>6-Week Loan</th>
<th>TOU Details</th>
</tr>
</thead>
</table>
Automation Options
Automation Options – On the Resource Sharing Library
Automation Options – Create Move Request

Resource Sharing Lending Requests Task List

External identifier: XYZ-123456
Request Status: Being Processed
Resource Locate Status: Resource Located
Requested Media: Any
Request Printed: No
Request Reported: No
Level of Service: Priority (Local)
Requested Format: Physical
Creation Date: 07/02/2018
Update Date: 07/02/2018

Citation Move Request in Process
## Automation Options – Managing Self Ownership

### Discovery Interface Display Logic

#### Institution Rules

<table>
<thead>
<tr>
<th></th>
<th>Active</th>
<th>Move Up</th>
<th>Move Down</th>
<th>Rule Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td>&lt;</td>
<td>Hide service Purchase Request</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td>&lt;</td>
<td>Hide service Digitization</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td>&lt;</td>
<td>Hide set</td>
</tr>
</tbody>
</table>

#### Sending Borrowing Request Rules

**Name**: dont send self owned

- **Description**: 
- **Created By**: Ex Libris Implementer
- **Created On**: 30/08/2017
- **Updated By**: Ex Libris Implementer
- **Updated On**: 26/10/2017

#### Input Parameters

<table>
<thead>
<tr>
<th>Name</th>
<th>Operator</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self Ownership</td>
<td>=</td>
<td>True</td>
</tr>
</tbody>
</table>

#### Output Parameters

| Send Request | False |
Using Another System with Alma
Digital Delivery
Digital Delivery - Old Status

- Digitize
- Upload
- Send
- Notification
- Save/view
Digital Delivery - Current Status

1. Digitize
2. ExLibris Alma
3. Notification
4. View

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Digital Delivery – The Benefits

• No use of attachments
• Resource is password protected
• Number of accesses is limited
• Resource is temporarily in the Alma cloud, and automatically removed after time

• Works for partners using Alma!
Digital Delivery

<table>
<thead>
<tr>
<th>Resource Information</th>
<th>Author initials</th>
<th>ISBN</th>
<th>OCLC number</th>
<th>Source</th>
<th>Call number</th>
<th>Volume</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Arnold, James R.</td>
<td></td>
<td>1-61069-003-6</td>
<td></td>
<td>D840 .C645 2012</td>
<td></td>
</tr>
<tr>
<td>Author</td>
<td>Wiener, Roberta.</td>
<td></td>
<td>780442989</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edition</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LCCN</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other standard ID</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Remote record ID</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Publication date</td>
<td>2012.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Additional person name</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Series title number</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Note</td>
<td>Description based upon print version of record.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Part</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pages</td>
<td>1 online resource (476 p.)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>End Page</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chapter title</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Digital Delivery

Resource Sharing Lending Requests Task List (1 - 1 of 1)

Assigned to Me | Unassigned | Assigned to Others

External Request ID: 9278

Activity Status: Active

1. Cold War [electronic resource].
   - Book (Book - Electronic text; computer; online resource)
   - By Arnold, James R. (Santa Barbara: ABC-CLIO 2012.)
   - OCLC Number: 780442890
   - Pages: 1 online resource (476 p.)
   - Subject: Cold War -- World politics -- World politics -- History of the United States
   - Electronic books, and others
   - MMS ID: 99133003200561

Alerts: Physical (1) Electronic (1)

Citation Digitization Request In Process

Scan in Items | Change Item Information

Scan in Items

Scan item barcode

Scan request ID

Create Item

<table>
<thead>
<tr>
<th>Title</th>
<th>Destination</th>
<th>Barcode</th>
<th>Request/Process Type</th>
<th>Requester</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cold War [electronic resource]</td>
<td>Digitization Department</td>
<td>12x</td>
<td>Ship Digitally</td>
<td></td>
</tr>
</tbody>
</table>
Digital Delivery

Ex Libris Implementer

Your request to create a digital version of the following material has been completed.

Title:

To download the resource:
- For local/LDAP users [click here].
- For SAML users (add idpCode if needed) [click here].
- For CAS users [click here].
- For your information, the maximum number of views of the resource is .

Sincerely,
Circulation Department
Digital Delivery

Maximum number of views exceeded

Download completed successfully
Copyright Management
There is an option in Alma to define copyright rules for resource sharing borrowing requests. These rules will cause the system to block borrowing requests from being sent to the lenders, until a copyright approval is indicated by the resource sharing library staff.
Set the System to Control Copyright for Resource Sharing

- In order to set the system to manage copyright for borrowing requests, use the Other Settings menu in the Fulfillment Configuration.
- The rs_borrower_copyright_management parameter should be set to true.

<table>
<thead>
<tr>
<th>Parameter Key</th>
<th>Module</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>rs_block_sending_requester_info</td>
<td>fulfillment</td>
<td>false</td>
</tr>
<tr>
<td>rs_borrower_copyright_management</td>
<td>fulfillment</td>
<td>true</td>
</tr>
<tr>
<td>rs_default_digitization_department</td>
<td>fulfillment</td>
<td></td>
</tr>
<tr>
<td>rs_default_pickup_location</td>
<td>fulfillment</td>
<td></td>
</tr>
</tbody>
</table>
Set the Rules

- Use the Digitization Profile Rules to define copyright management rules for resource sharing borrowing requests
Set the Rules

• Defining a rule as below means:
  • If request is a borrowing resource sharing request
  • AND
  • The same resource (title/isbn) has been requested more than 5 times
  • THEN
  • Copyright clearance is required
Set the Rules

- A default rule may be set up so that resource sharing requests are allowed with no restriction up to the 6th request.
Request Status

- As a result of these rules, when the same title (title + isbn/issn) is requested for the first 5 times, and the request is for digital fulfillment
  - The request is processed for automatic or manual sending as configured
  - The Copyright Status is ‘No Copyright Restrictions’
Request Status

- As a result of these rules, when the same title (title + isbn/issn) is requested for the 6th time, and the request is for digital fulfillment
  - The request gets a special status of ‘Pending Approval’.
  - The Copyright Status is ‘Copyright Not Approved’
- There is no Send option for this request
- The automatic send rules ignore requests with this status
Request Status

- In order to be able to send the request, an operator must manually change the copyright status to ‘Copyright Approved’ or to ‘No Copyright Restrictions’
• Only then does the option to send show up
Copyright Status Communicated to Lender

• When the request is sent, a Copyright Compliance indicator on the ISO message indicates whether it was sent as Copyright Approved (CCG) or as No Copyright Restrictions (CCL)

```xml
<ItemId>
  <ItemType>2</ItemType>
  <Title>Polar research</Title>
  <PublicationDateOfComp xsi:nil="true" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"/>
  <AuthorOfArticle>Leif O. Anderson</AuthorOfArticle>
  <TitleOfArticle>Observing the Arctic Ocean carbon cycle in a changing environment</TitleOfArticle>
  <ISSN>1751-0369</ISSN>
</ItemId>
'RetryFlag'>False</RetryFlag>
  <CopyrightCompliance>CCG</CopyrightCompliance>
```
Copyright Status Communicated to Lender

- The lender will see the communicated status on the request form
Copyright Status Communicated to Lender

- The copyright status is reportable in Analytics
Quick Shipping of Resource Sharing Items
Shipping Resource Sharing Items

• Shipping items for fulfilling a lending request may be based on an existing lending request

• This would be an efficient process if the lending request is created automatically by an incoming ISO ILL message

• However, if the lending requests are created manually (in an email based workflow), creating the lending request and then shipping the item may be laboursome

• The next couple of slides will describe an efficient process for quickly shipping items without first creating a lending request
Say you got an email with a request ....

Dear Sir/Madam,

The following is requested from your library:

- Request ID: TRINTEGRATION0008974
- Format: Book
- Title: Finding Common Ground U.S. Export Controls in a Changed Global Environment
- Author: Exports, Panel on the Future Design and Implementation of U.S.
- Publisher: National Academies Press
- Place of Publication: Washington :
- Call Number: HF1414.5
- Additional Person Name: Staff, National Academy Sciences.
- Note: Description based upon print version of record.
- Date: 28/07/2016
- Request ID: TRINTEGRATION0008974
- Request Format: Physical

Sincerely
Resource Sharing Library
The ILL Department
University of Ex Libris
Alma Avenue
You search, find the resource...

<table>
<thead>
<tr>
<th>Material Type</th>
<th>Book (2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Language</td>
<td>English (1)</td>
</tr>
<tr>
<td>Publication Year</td>
<td>1900 (2)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Primary Sort by</th>
<th>Rank</th>
</tr>
</thead>
</table>

**Finding Common Ground [electronic resource]: U.S. Export Controls in a Changed Global Environment**

- **Update Date:** 28/07/2016
- **Language:** English
- **Medium Type:** [electronic resource]
- **Record number:** (EBL)3376964

**Availability:** Physical version available at **MAIN: main; 1123; 1123** (1 copy; 1 available)
... and put the call number on the slip

Requested Material

Dear Sir/Madam,

The following is requested from your library:

Request ID: TRINTEGRATION0008974
Format: Book
Title: Finding Common Ground U.S. Export Controls in a Changed Global Environment
Author: Exports, Panel on the Future Design and Implementation of U.S.
Publisher: National Academies Press
Place of Publication: Washington:
Call Number: HF1414.5
Additional Person Name: Staff, National Academy Sciences.
ISBN: 0-309-04392-1
Note: Description based upon print version of record.
Date: 28/07/2016
Request ID: TRINTEGRATION0008974
Request Format: Physical

Sincerely,
Resource Sharing Library
The ILL Department
University of Ex Libris

MAIN: main; 1123; 1123
All that remains to be done is to ship the item!

• After fetching the item, use the Shipping Items screen to:
  • Select the borrower and request id
  • Wand in the item barcode
A configurable warning pops up

Lending request does not exist in the system. A new request will be created.
And that’s it!

A Shipping Slip may be printed using ‘Print Slip’
Resource Sharing Shipping Slip Letter

Supplied To: Birmingham University
Shipping Address:
625 finch ave.
Willowdale
Email: mosheshchtr@gmail.com
Phone:
Borrower Reference: TRINTEGRATION0008974

My ID  TRINTEGRATION0008974
Date Needed By:
Request Note:
Requester Email:

Item Barcode: 9645133
Finding Common Ground U.S. Export Controls in a Changed Global Environment
Library: Resource Sharing Library
Location: Lending Resource Sharing Requests
A lending request was automatically created ...

<table>
<thead>
<tr>
<th>Limit results to:</th>
</tr>
</thead>
<tbody>
<tr>
<td>status</td>
</tr>
<tr>
<td>Shipped Physically (1)</td>
</tr>
<tr>
<td>Request Printed</td>
</tr>
<tr>
<td>Yes (1)</td>
</tr>
<tr>
<td>Request Reported</td>
</tr>
<tr>
<td>No (1)</td>
</tr>
<tr>
<td>Active Partner</td>
</tr>
<tr>
<td>Birmingham University (1)</td>
</tr>
<tr>
<td>Creation Date</td>
</tr>
<tr>
<td>Today (1)</td>
</tr>
<tr>
<td>Update Date</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Assigned to Me</th>
<th>Unassigned</th>
<th>Assigned to Others</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Activity Status</th>
<th>Active</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add</td>
<td>Refresh</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Book (Book - Electronic)</th>
</tr>
</thead>
<tbody>
<tr>
<td>ISBN: 0-309-044392-1 and others</td>
</tr>
<tr>
<td>Subject: United States - Commercial policy. -- Electronic books</td>
</tr>
<tr>
<td>External identifier: TRINTEGRATION008974</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Availability</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical version temporarily at MAIN: main; 1123; 1123</td>
<td></td>
</tr>
<tr>
<td>Physical version temporarily at RES_SHARE: IN_RS_REQ; 1123 (1 copy, 0 available)</td>
<td></td>
</tr>
<tr>
<td>Electronic version at National Academies Press: Full Text</td>
<td></td>
</tr>
<tr>
<td>Electronic version at ebrary Academic Complete Subscription UK Edition: Full Text</td>
<td></td>
</tr>
<tr>
<td>Barcode: 961413</td>
<td>Due Date: 25/09/2016</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Request Status: Shipped Physically</th>
<th>Resource Locate Status: Resource Located</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request Printed: Yes</td>
<td>Request Reported: No</td>
</tr>
<tr>
<td>Creation Date: 20/07/2016</td>
<td>Update Date: 20/07/2016</td>
</tr>
<tr>
<td>Level of Service: Priority (Local)</td>
<td></td>
</tr>
<tr>
<td>Alerts: Citation Move Request In Process</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>More details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit</td>
</tr>
</tbody>
</table>
... and the item is marked as shipped
Configuration

- Mark the resource sharing library with ‘Automatic Creation’
Configuration

• The warning is configurable in the ‘Other Settings menu

| rs_enable_lending_ship_warn_popup | fulfillment | true |
Recalls
### Recalls

#### Physical Items

<table>
<thead>
<tr>
<th>Title</th>
<th>Library</th>
<th>Due Date</th>
<th>Barcode</th>
<th>Item Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cold morning sky / Book by Zabuncis / Merya, (Macmillan 1938, 1937)</td>
<td></td>
<td></td>
<td>na27482-TEMP</td>
<td><a href="#">Notes</a></td>
</tr>
</tbody>
</table>

**Other details**

- **Barcode:** na27482-TEMP
- **Request with active notes**

**Patron Services**

- **Ex Libris Implementer**
  - **Active balance:** 0
  - **ID:** 0000000000
  - **Email:** imple1@staff
- **Send Activity Report:** Send Requests Report
- **User Notes:**
  - User has 17 item(s) waiting for pickup at this desk.
  - User has 11 item(s) waiting for pickup at Main Library Library
  - Test Note

**Scan item barcode:**

- **Title:** Cold morning sky / Book by Zabuncis / Merya, (Macmillan 1938, 1937)
- **Bar Code:** na27482-TEMP
- **Due Date:** 11/02/2016
- **Pickup At:** Resource Sharing Library
- **Level of Service:** Priority (Local)
- **Requested Format:** Physical
- **Creation Date:** 07/02/2016
- **Update Date:** 07/02/2016

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Recalls

Resource Sharing Lending Requests Task List (1 - 1 of 1)

Resource Sharing Borrowing Requests (1 - 1 of 1)

Cold morning sky
- OCLC Number: DE-5040002010
- Pages: viii, 62 p.

External Identifier: TRINTEGRATION0000361
Internal Identifier: 33132013500000561
Request Status: Recall
Partner: Training Institution
Requested Media: Any
Requester: Ex Libris Implementer
Due date: 10/02/2018
Pickup At: Resource Sharing Library
Level of Service: Priority (Local)
Requested Format: Physical
Creation Date: 07/02/2018
Update Date: 07/02/2018

Other details
Dear [Name],

Your borrowed item has been recalled. See details for change in due date.

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
<th>Author</th>
<th>Old Due Date</th>
<th>New Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cold Morning Sky</td>
<td></td>
<td></td>
<td>11/02/2018</td>
<td>10/02/2018</td>
</tr>
</tbody>
</table>

Sincerely,

Circulation Department
Recalls

Resource Sharing Partner

Training Institution

<table>
<thead>
<tr>
<th>Code</th>
<th>TR_INST</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile Type</td>
<td>ISO</td>
</tr>
<tr>
<td>System Type</td>
<td>Alma</td>
</tr>
<tr>
<td>Average Supply Time</td>
<td>0</td>
</tr>
<tr>
<td>Currency</td>
<td></td>
</tr>
<tr>
<td>Supports Borrowing</td>
<td>✔</td>
</tr>
<tr>
<td>Supports Lending</td>
<td>✔</td>
</tr>
<tr>
<td>Locate Profile</td>
<td></td>
</tr>
</tbody>
</table>

Name: Training Institution
Status: Active
Delivery Delay (days): 0
Borrowing Workflow: BORROW
Lending Workflow: Lending

Workflow Profiles

<table>
<thead>
<tr>
<th>Workflow Profile</th>
<th>Type</th>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 44LAN</td>
<td>Borrowing</td>
<td>Automatic renew,Cancel request not accepted,Cancelled By Patron,Cancelled by partner,Cancelled by staff,Declared lost by partner,Externally Obtained,Lender check in My renew,Mediated Patron Renewal,Recalled by partner,Reject,Renew requested,Report damaged Item to partner,Report lost item to partner,Request accepted,Waiting for cancel response,Waiting for receive digitally,Will Supply</td>
</tr>
<tr>
<td>2 BORROW</td>
<td>Borrowing</td>
<td></td>
</tr>
</tbody>
</table>

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Recalls

You can configure which loans are recalled first if the requested resource has both copies that were shipped to a remote borrower and copies loaned to local patrons. The parameter that controls this choice, `rs_prefer_recall_method`, defaults to `False` (see Configuring Other Settings). Changing it to `True` recalls the shipped item first, rather than the locally loaned copy.

Recalls are supported if the borrowing workflow profile includes the **Recall item** action (see Configuring Workflow Profiles).
Form Customization
## Form Customization

### Resource Sharing Form Customization

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Mandatory</th>
<th>Visible</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 For Library (please select):</td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>

### Book fields

<table>
<thead>
<tr>
<th>Move Up</th>
<th>Move Down</th>
<th>Field Name</th>
<th>Mandatory</th>
<th>Visible</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>Citation type</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>Title</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td>Author (Last name, first name):</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>4</td>
<td></td>
<td>Author Initials:</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>5</td>
<td></td>
<td>Specific Edition Only:</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>6</td>
<td></td>
<td>Edition</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>7</td>
<td></td>
<td>ISBN</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>8</td>
<td></td>
<td>LCCN</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>9</td>
<td></td>
<td>OCLC Number</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>...</td>
<td></td>
<td>Publisher</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>...</td>
<td></td>
<td>Publication date:</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>...</td>
<td></td>
<td>Place of publication:</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>...</td>
<td></td>
<td>Additional Author (Last name, first name):</td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>
# Form Customization

## Code Table

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>68</td>
<td>c.uresolver.error</td>
</tr>
<tr>
<td>59</td>
<td>c.uresolver.request.ill</td>
</tr>
<tr>
<td>70</td>
<td>c.uresolver.request.ill.owner</td>
</tr>
<tr>
<td>71</td>
<td>c.uresolver.request.ill.citationType</td>
</tr>
<tr>
<td>72</td>
<td>c.uresolver.request.ill.citationType.book</td>
</tr>
<tr>
<td>73</td>
<td>c.uresolver.request.ill.citationType.article</td>
</tr>
<tr>
<td>74</td>
<td>c.uresolver.request.ill.format</td>
</tr>
<tr>
<td>75</td>
<td>c.uresolver.request.ill.format.physical</td>
</tr>
<tr>
<td>76</td>
<td>c.uresolver.request.ill.format.digital</td>
</tr>
<tr>
<td>77</td>
<td>c.uresolver.request.ill.format.physicalNonReturnabl</td>
</tr>
<tr>
<td>78</td>
<td>c.uresolver.request.ill.delivery.location</td>
</tr>
<tr>
<td>79</td>
<td>c.uresolver.request.ill.delivery.library</td>
</tr>
<tr>
<td>80</td>
<td>c.uresolver.request.ill.delivery.alternative</td>
</tr>
</tbody>
</table>
Resource Sharing Request Renew
Renewal - Scenario

1. Patron requests renewal from Primo

2. Borrower staff approve request and send ISO messages or email to lender

3. Lender rejects/approves the request

4. Borrower updates status as renewed
Renewal – Setup Comment

• We will demonstrate the following setup:

• Borrowing Workflow Profile set to Mediated Patron Renewal on borrower side

• Borrowing Workflow Profile set to Manual Renew on lender side
Renewal – Setup Comment

- This setup will have the following effect:
  - Patron will be able to request renewal from Primo
  - The patron renew request will not activate the renew action. Rather, it will change the borrower request status to Mediated Patron Renewal. Staff will then have to manually send the renew request to the lender.
(1) Patron Requests Renewal

<table>
<thead>
<tr>
<th>#</th>
<th>Title</th>
<th>Due Date</th>
<th>Due Hour</th>
<th>Potential Fine</th>
<th>Location</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>FIRST EXAMPLE</td>
<td>06/30/16</td>
<td>17:00</td>
<td></td>
<td>Resource Sharing Library</td>
<td>Renewable</td>
</tr>
<tr>
<td>2</td>
<td>Challenges for Europe: the euro, the dollar and gold: proceedings of the conference held in Berlin on 16th November 2001</td>
<td>07/09/15</td>
<td>21:00</td>
<td>40.00 USD</td>
<td>Main Library General</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Lang zhan shi = History of cold war / (Vol. 1no. 2)</td>
<td>05/19/15</td>
<td>20:00</td>
<td>56.00 USD</td>
<td>Main Library General</td>
<td>Renewable</td>
</tr>
</tbody>
</table>

The renewal request was successfully submitted.

The renewal request will be handled by the appropriate library staff.
(2) – Borrower Renew Request is Sent to Lender

- Request status is changed to Mediated Patron Renewal
- Staff can now request the renewal from the lender
(2) – Borrower Renew Request is Sent to Lender

- If the partner is an ISO partner then a renew message is sent.
- If the partner is an email partner then a renew email is sent.
Renewal – Setup Comment

• We can set the workflow profile so that patron renew request is directly sent to the lender. This is done by setting the lender workflow profile:
  • Patron Renewal – allows patrons to request from Primo
  • Staff Renewal – allows staff to request renewal from Alma
(3) – Lender Approves or Rejects the Renew Request

- If the request is an ISO request then the lender side request automatically changes status to Renew Requested.
- Regardless of whether the request is ISO or not, the lender operator users a Renew option to manage the renew request.
(3) – Lender Approves or Rejects the Renew Request

- Lender can accept or reject the request

- Accepting the renew request automatically updates the due date on the lender side.
  - If the request is ISO then a message is set to the borrower.
Renewal – Setup Comment

• In case of ISO partner, the lender side may be configured to automatically accept all renew requests
  • There will be no need for lender to accept renew requests

• This is done by configuring the borrowing workflow profile on the lender side for ‘Automatic Renew
(4) – Borrower Side Updates Renew Status

• If the request is an email request, the borrower has to manually update the renew
• If the request is ISO then update is automatic
In either case, the following happen automatically when the renew is updated on the borrower side:

- Loan due date is updated
- Borrower request due date is updated
- Notification is sent to the lender
Workflow Profiles
What are Workflow Profiles?

- Resource sharing workflows may include many steps.
- Not all steps may be desired by all libraries. For example:
  - Some libraries do not want to allow recalls.
  - Some libraries do not want to allow patrons to request renewal.
  - Some libraries want to allow patrons to request renewals, but want to have a librarian mediate the renew request.
- Workflow Profiles enable configuring which of the resource sharing steps are allowed for library managed workflows.
How are they configured?

• Alma allows defining separately:
  • Borrowing Workflow Profile.
    • For some actions the profile defines how the partner will be managed when the partner acts as my library’s borrower.
    • For some actions the profile defines how the partner will be managed when the partner acts as my library’s lender.
  • Lending Workflow Profile.
    • For some actions the profile defines how the partner will be managed when the partner acts as my library’s lender.
    • For some actions the profile defines how the partner will be managed when the partner acts as my library’s borrower.

• You must look up the specific action you are configuring to know whether it should be configured on the Borrowing or on the Lending Workflow Profile
For Example ...

• In the below example:
  • The BORROW Workflow Profile defines how resource sharing workflow will be managed when the partner is the borrower to which my library is lending

• The LEND Workflow Profile defines how resource sharing workflow will be managed when the partner is the lender from which my library is borrowing

You must look up the specific action you are configuring to know whether it should be configured on the Borrowing or on the Lending Workflow Profile
How are they configured?

<table>
<thead>
<tr>
<th>Configuring</th>
<th>Filter List</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training and Integration</td>
<td>work</td>
</tr>
<tr>
<td>Resources (1)</td>
<td></td>
</tr>
<tr>
<td>Fulfillment (2)</td>
<td></td>
</tr>
<tr>
<td>General (4)</td>
<td></td>
</tr>
</tbody>
</table>

- Resource Sharing
- Workflow Profiles
- Leganto
  - Course Management Workflow
How are they configured?

<table>
<thead>
<tr>
<th>Workflow Profile</th>
<th>Type</th>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Borrowing</td>
<td>Automatic renew, Cancel request not accepted, Cancelled By Patron, Cancelled by partner, Lender check in, Mediated Patron Renewal, Reject, Report damaged item to partner, Request accepted, Waiting for receive digitally</td>
</tr>
</tbody>
</table>

Add Workflow Profile

- Automatic renew
- Cancelled By Patron
- Canceled by partner
- Declared lost by partner
- Lender check in
- Mediated Patron Renewal
- Reject
- Report damaged item to partner
- Request accepted
- Waiting for receive digitally
How are they configured?

- Workflow Profiles are linked to Partner records, and define how the workflows will be managed when that partner is the peer partner.
Borrowing Workflow Profile – Automatic Renew

- This action is relevant for workflows of type:
  - ISO
  - NCIP P2P

When the linked partner borrowed from me and is requesting to renew:
Will I automatically respond with ‘Renew Accepted’ and renew the shipped loan
• This action is relevant for all workflow types

Will I be able to renew items that have been shipped to the linked partner
Borrowing Workflow Profile – Manual Renew

- This action is relevant for all workflow types

Will I be able to renew items that have been shipped to the linked partner
• This action is relevant for all workflow types

When the linked partner is my lender:
  • Patron may request renewal from Primo
  • If patron requests to renew, the renew message will not be automatically sent to the lender. Instead, the request status will change to Mediated Patron Renewal
Borrowing Workflow Profile – Cancelled by Patron

- This action is relevant for all workflow types

When the linked partner is my lender:
Can the patron cancel the request from the Primo My Account requests list
Borrowing Workflow Profile – Cancelled by Staff

• This action is relevant for all workflows types

When the linked partner is my lender:
Can the staff cancel the request from the Alma screen
Borrowing Workflow Profile – Waiting for Cancel Response

• This action is relevant for workflows of type:
  • ISO
  • NCIP P2P

When the linked partner is my lender:
Will I wait for a cancellation response.
• If selected, every cancelled request will be Waiting for Cancel Reply until lender accepts the cancellation
Borrowing Workflow Profile – Waiting for Cancel Response

• This action is relevant for workflows of type:
  • ISO
  • NCIP P2P

When the linked partner is my lender:
Will I wait for a cancellation response.
• If not selected, every cancelled request will be considered cancelled without waiting for the lender to accept the cancellation
Borrowing Workflow Profile – Recalled by Partner

• This action is relevant for workflows of type:
  • ISO
  • NCIP P2P

If selected:
Request that has been shipped to the borrower will be recalled if requested by a library patron
Borrowing Workflow Profile – Reject

• This action is relevant for all workflow types:

When the linked partner is my lender:
Can I manually reject the request using the Reject option
• This action is relevant for all workflow types:

The recommended use is for ISO and NCIP P2P partners to disable this option. For these users, the rejection is expected to be reported by the lender and not manually triggered by the borrower.
Borrowing Workflow Profile – Lender Check In

• This action is relevant for workflows of type:
  • ISO
  • NCIP P2P

If selected:
Request that has been returned by the borrower will be not be closed until checked in
Borrowing Workflow Profile – Lender Check In

- This action is relevant for workflows of type:
  - ISO
  - NCIP P2P

If not selected: Request that has been returned by the borrower will be closed automatically.
Lender Workflow Profile – Lender Check In

• This action is relevant for workflows of all types:

When the linked partner is my lender:
If not selected then returned borrowing requests will be considered completed once returned, without waiting for a lender confirmation.
Borrowing Workflow Profile – Receive Digitally

• This action is relevant for workflows of all types

If selected:
Request that has been shipped digitally to the linked borrower will remain open until a Received indication is received from the borrower.
Borrowing Workflow Profile – Receive Digitally

• This action is relevant for workflows of all types

If not selected:
Request that has been shipped digitally to the linked borrower will be considered closed
Borrowing Workflow Profile – Will Supply

• This action is relevant for workflows of types:
  • ISO
  • NCIP P2P

Will I be able to respond with ‘Will Supply’ to requests that have been received from a linked borrower
Borrowing Workflow Profile – Externally Obtained

• This action is relevant for workflows of type:
  • External System

This option should be used when the lending partner is the CCC GetItNow partner. Please refer to https://knowledge.exlibrisgroup.com/Alma/Training/02_What's_New_Videos_2018/01_December_2018_Release/Support_for_CCC_GetItNow_Service_in_Resource_Sharing for more information
Lending Workflow Profile – Renew Response

• This action is relevant for all workflow types

When the linked partner is my lender:

If selected then renew requests will be considered ‘Waiting for Renew Approval’ until lender approval is received.
Lending Workflow Profile – Renew Response

- This action is relevant for all workflow types

When the linked partner is my lender:
If not selected then renew requests will be considered approved without waiting for lender approval
Lending Workflow Profile – Patron Renewal

• This action is relevant for all workflow types

When the linked partner is my lender:
Will patrons be able to request renewals from Primo
Lending Workflow Profile – Staff Renewal

• This action is relevant for all workflow types

When the linked partner is my lender:
Will staff be able to request renewals from Alma
Resource Sharing – Receiving Multiple Items
Request is placed **by the patron** with an indication that multiple issues are requested.
Request is placed by the staff on behalf of the patron with an indication that multiple issues are requested.
Items are received by the borrower. In this example barcodes are shared between borrower and lender, allowing borrower to simply scan in the first received item’s barcode.
Receive first item

The standard Receive Items page shows up, allowing to update information such as location, due date or item policy.

Note the ‘Multiple Items’ check box. Selecting this box allows to continue scanning in (and receive) more items for the same request.
Receive all items

It is now possible to continue scanning in more barcodes for all of the items that are received for the same request.

The received items are listed in the lower part of the screen.
Receive all items

After all items have been scanned in, clicking Done will finish receiving items for this request.
Single request has been received

After being Done, a single request is registered as received in the Receive Items screen.

More requests can continue to be received.
Request links to multiple barcodes

The request for which multiple items have been received has a ‘Multiple barcodes’ indication in the borrowing requests task list.
Request links to multiple barcodes

The ‘Multiple barcodes’ indication links to the Received Items tab, where the received items and their status is shown.
Hold Shelf

Separate temporary items exist in the system, so that it is possible to scan each one at the required pickup location to trigger a hold shelf notification.

If the items have been received at the pickup location then a hold shelf notification has already been sent at receive time.
Individual items may be loaned out as usual. Their status is updated in the request’s ‘Received Items’ tab.
Return

Individual items may be returned as usual. Their status is updated in the request’s ‘Received Items’ tab.

Note that the request status remains ‘Loaned to Patron’ until the last item has been checked in.
Full Return

During the check in process the system counts the returned items.
Full Return

The request is Completed when the last item is checked in.
Funds in Resource Sharing
Funds in Resource Sharing

• As of August 2017, it is possible to link borrowing resource sharing requests to Alma Funds
• This enables managing shipping costs using Alma’s funds management tools
The Fund Types code table should enable the ‘Resource Sharing’ Fund type. This fund type is disabled by default.
Configurations

• Create your resource sharing ledger and fund. The fund will be of type ‘Resource Sharing’
Configurations

- No change in fund and ledger management

  - The Fund should be allocated sums, just like any regular fund
  
  - Standard rules, such as ‘Overencumbrance allowed’ and ‘Overexpenditure limit sum’
Workflow - Encumbrance

• When creating a request (in Alma), or editing an existing request, there is an option to set a fund for the request.
Workflow - Encumbrance

• The list of funds to select from are funds that match all of the below criteria:
  • Funds are of type ‘Resource Sharing’
  • Funds belong to the active fiscal year

<table>
<thead>
<tr>
<th>Name</th>
<th>Code</th>
<th>Fiscal Period</th>
<th>Available Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Borrowing Requests BL</td>
<td>RS_6</td>
<td>01/01/2017 - 12/31/2017</td>
<td>1,000.00 GBP</td>
</tr>
</tbody>
</table>
Workflow - Encumbrance

• In addition, funds will appear:
  • If the funds’ ‘Available For’ is the institution
  Or
  • If the funds’ ‘Available For’ matches the resource sharing library of the borrowing request
Workflow - Encumbrance

- The request creates an encumbrance on the fund

- In my example, the borrower request was with a shipping cost of $100. The fund is in GBP, resulting in an encumbrance of 77 GBP.
• The fund transaction is linkable from the request
Workflow - Encumbrance

• The request is linkable from the fund transaction
Workflow - Encumbrance

- Changing the shipping cost will update the encumbrance.
Workflow - Expenditure

- For ISO requests, shipping cost may be automatically updated by the lender via the ‘Shipped’ message.
- It is possible to change the shipping cost and fund at receive time.
• It is also possible to change the shipping cost and fund after request is received
Workflow - Expenditure

• After the receive is done:
  • The a dis-encumbrance is created to balance out the previously created encumbrance
  • An expenditure is created, as per the shipping cost at receive time
It is also possible to edit the cost and fund information from within the Receive Items interface.
Workflow - Expenditure

- If fund is over expended or over encumbered:
  - A warning will show up.

Expenditure operation failed. Reason: Fund Borrowing Requests BL does not have enough money for executing the desired transaction
Workflow - Expenditure

• If fund is over expended or over encumbered:
  • A faceted note will indicate this request in the task list
Broker Workflows and Integrations
Basic Layout

Borrower
Library

Lender
Library
Overview And History

ACNP
Catalogo Italiano dei Periodici

You are here: Home > Useful links > NILDE - Network Inter Library Document Exchange

Useful links

NILDE - Network Inter Library Document Exchange

http://nilde.bo.cnr.it/
Borrower Side

Primo

Alma

Borrower

Library
Lender Side

Lender Library

Alma
Integrations

Z39.50 (OPAC)
Integrations

- OpenURL
- Static URL
Integrations

NCIP v2.0

NCIP v2.0
Requesting (1) - Direct

Borrower
Library

Alma
Requesting (2) – Partner Setup

Advantages:
- Single requesting point for patron
- Depends on patron privilege
- Checks patron blocks
- May depend on previous login
### Advantages:
- **Single requesting point** for patron
- May make use of additional conditions
Author: John F. McMillar
Title: Running your small business
ISSN: 0742-6550
LCCN: sn 84006046
OCLC Number: 10399453
Place of Publication: [Portland, Or. : Publisher: The Business Journal of Portland Inc
Publication Date: c1984?-
Note: At head of title: Portland.
Issue: 10
Pages: 12-34
Journal Title: The Business journal.
Author of Article: John F. McMillar
DOI: 954111
PMID: 654321
Specific Edition Only: true
Requester: exl_impl
Requested Format: PHYSICAL
Requested Media: Any
Allow Other Format: false
Preferred Send Method: MAIL
Date Needed By: 2015-07-30
Requested Pickup location: Main Library
For Reading-Room Use Only: false
Shipping Cost: 35
Willing to Pay: true
Agree to Copyright terms: true
Needs Patron Information: false
External ID: EXLDEV10000023
Institution: Main Campus
Requesting (4)
Requesting – Authentication (1) – Independent Auth

My Interlibrary Loan/Document Delivery Account

This service allows you to request materials not owned by the Boston College Libraries.

Enter your Boston College user name and password. Then click the "Logon to ILLiad" button.

* Username

* Password

Logon to ILLiad
Requesting – Authentication (2) – Rely on Alma

Is patron in good standing:
- No blocks
- No limit
- Has Resource Sharing Library
- Account active
Lender Requesting – (1)

✓ Pick from shelf slip

Lender
Library
Lender Requesting – (2)

- Move request may be automatically placed, or using Manage Fulfillment Options
- Pick slip may be automatically printed based on circ desk configurations

Message may include:
- ISBN/ISSN
- OCLC Number
- MMS ID
CheckOutItem is used to:

- **Notify** Alma that item has been shipped to borrower
- Item is identified as in a resource sharing process
- If no RequestItem message was sent, lending request will be created at this point

Message may include an indication that the shipment is digital.

**In this case, the request will be closed**
AcceptItem is used to:

✓ **Notify** Alma that an item has arrived
✓ **Temporary item is created** in Alma, with a request that is linked to the external request ID
✓ Hold Shelf notification is sent

Message may include an indication that the shipment is digital.

*In this case, the request will be closed*
Borrower Renew Request (1)

CirculationStatusUpdate (Pending Renewal)
Lender Renewal Request

Alma will check:
✓ Is item requested?
✓ Is max renewal

Alma will respond with calculated date, or use broker supplied date.
Borrower Renew Request Status

Borrower

Library

CirculationStatusUpdate
(Renewed/Rejected)
Renew Process

Primo

Borrower Library

CirculationStatusUpdate (Renewed/Rejected)

RenewItem

Lender Library

RenewItem
Recall Process

RecallItem

Borrower
Library

Primo

RecallItem

Lender
Library
CheckInItem is used to:

- **Notify** Alma that temporary item has been shipped back to lender
- **Temporary item is deleted** in Alma, and the loan is cancelled (if has not been cancelled before)
CheckInItem is used to:

- **Notify** Alma that item has been returned by borrower
- Item is processed back for shelving at original location
Lender Cancel Request
Fulfillment Network Workflows and Configurations
Resource Sharing Network

• The patron’s home institution is the patron’s service provider.

• The patron’s home institution staff uses its own availability information, priorities and workflow considerations.

• The patron’s home institution is accountable for the loaned item from the perspective of the resource owning library.

• The home institution may activate a load balancing process to select the appropriate supplier.

• The pickup location is always at the patron’s home institution.
Fulfillment Network
Fulfillment Network

• The resource owning library is the patron’s service provider. The patron directly requests the resource from the remote member institution.

• The resource may be picked up anywhere

• The resource owning library directly manages all aspects of the loan cycle with the requesting patron, including
  ➢ Loan management (overdue, lost, renew etc.)
  ➢ Fine/fee related issues
Fulfillment Network – User Value

• The Fulfillment Network lowers the library involvement in terms of configuration, maintenance of supplier lists and in terms of staff mediation of the requests.
• The responsibility for obtaining the resources is levied on to the end user, leaving library staff out of this process.
Fulfillment Network – Considerations

- Patron information may be freely shared between the institutions of the network.
- Institutions can agree on the policies by which their resources will be lent to different patron types of other institutions.
- The member institutions inventory is discoverable by patrons of all network members.
Fulfillment Network - Workflows

- A single institution may participate in multiple fulfillment networks

- Functional Highlights
  - Walk-In Loans
  - Direct Requesting
  - Pick up Anywhere
  - Consortial patron card in Primo
Configuring the Fulfillment Network
Configuring the Fulfillment Network

- Libraries
  - Add a Library or Edit Library Information
  - Relationships
  - Define Campuses

- Locations
  - Remote Storage

- Work Orders and Departments
  - Work Order Types
  - Work Order Departments

- External Systems
  - Integration Profiles
  - S/FTP definitions
  - Allowed Emails
  - Allowed S/FTP connections

- User Interface Settings
  - Alma Logo and Color Scheme
  - Delivery System Skins
  - Policies
  - Social Login Labels

- General Configuration
  - Letter emails
  - Letter Activity
  - Letter Retention
  - Notification Template
  - XML To Letter Admin
  - Customize Letters
  - Other Settings
  - Institution Languages
  - Home page Notifications
  - CRM Contacts
  - Staff Login Report
  - Institution Notifications

- Widgets
  - Customized Widgets
  - Primo Widget Search Fields
  - Primo Widget Search Precision

- Collaborative Networks
  - Network Zone Setup
  - Institution Member Setup
  - Cross Consortia Identifiers
  - Republish Shared Entities

- Network Groups
  - Fulfillment Network Groups
  - Fulfillment Member
  - Institutions Relations
# Members (possible in NZ)

## Mapping Table

**You are configuring:** Training - Network Zone - Clean  Change Organization Unit

### Fulfillment Members

<table>
<thead>
<tr>
<th>Table Description</th>
<th>Customization mode</th>
<th>Managed in Network</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fulfillment Members</td>
<td>Entire table needs to be customized</td>
<td>No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Enabled</th>
<th>Customer Code</th>
<th>URL</th>
<th>Display Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>TRAINING_MEMBER1_CLEAN</td>
<td><a href="http://il-urm08.corp.exlibrisgroup.com:180">http://il-urm08.corp.exlibrisgroup.com:180</a></td>
<td>TRAINING_MEMBER1_CLEAN</td>
</tr>
<tr>
<td>2</td>
<td>TRAINING_MEMBER2_CLEAN</td>
<td><a href="http://il-urm08.corp.exlibrisgroup.com:180">http://il-urm08.corp.exlibrisgroup.com:180</a></td>
<td>TRAINING_MEMBER2_CLEAN</td>
</tr>
</tbody>
</table>
Groups (possible in NZ)

Fulfillment Networks Management Group Details

**Name:** a

**Group Description:**

Save change

1 - 2 of 2

<table>
<thead>
<tr>
<th>Member</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRAINING_MEMBER1_CLEAN</td>
<td>INSTITUTION</td>
</tr>
<tr>
<td>TRAINING_MEMBER2_CLEAN</td>
<td>INSTITUTION</td>
</tr>
</tbody>
</table>

Add another member

Training - Member 1 - Clean
Relations (possible in NZ)

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
<th>Circulate For</th>
<th>Deliver To</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRAINING_MEMBER2_CLEAN</td>
<td>TRAINING_MEMBER1_CLEAN</td>
<td>✓</td>
<td>✓</td>
<td>-</td>
</tr>
<tr>
<td>TRAINING_MEMBER1_CLEAN</td>
<td>TRAINING_MEMBER2_CLEAN</td>
<td>✓</td>
<td>✓</td>
<td>-</td>
</tr>
</tbody>
</table>
### Main Library

<table>
<thead>
<tr>
<th>Organization Unit</th>
<th>Library Type</th>
<th>Code</th>
<th>Path</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Unit</td>
<td>Library</td>
<td>MAIN</td>
<td>TRAIN_NZ_CLEAN.TRAINING_ME...</td>
<td>.</td>
</tr>
</tbody>
</table>

#### General Details

- **Organization unit name**: Main Library
- **ISIL Code**: 
- **Base Url**: 
- **Description**: 
- **Default location for acquisition**: Open Location Type: Stacks
- **Campus**: Main Campus
- **Proxy**: 
- **Serves Other Institutions**: Yes

#### Resource Sharing Information
## Pickup at Any Institution

### Terms of Use Management

#### Terms of Use Details

<table>
<thead>
<tr>
<th>Name</th>
<th>3 Month Staff General</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>3 Month Staff General</td>
</tr>
</tbody>
</table>

#### Terms of Use Policies

<table>
<thead>
<tr>
<th>Policy Type</th>
<th>Policy Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1  Is Requestable</td>
<td>Requestable (Requestable)</td>
</tr>
<tr>
<td>2  Pickup Locations</td>
<td>At Any Institution</td>
</tr>
<tr>
<td>3  Hold Shelf Period</td>
<td>7 day Hold Shelf (Default value for HoldShelfPeriod)</td>
</tr>
<tr>
<td>4  Is Digitizable</td>
<td>Is Digitizable (Default value for digitizable)</td>
</tr>
</tbody>
</table>
Consortial Services Privilege

Role: Circulation Desk Operator

Privileges:
- Select All
- Add Edit Delete Notes Privilege
- Change Due Date Privilege
- Change Return Date Privilege
- Circ Desk Operator Privilege
- Consortial Services Privilege
- Create Remove Blocks Privilege
- Digital Inventory View
- Fines Fees Report
- Manage Exports
- Override Block Request
- Pay Fines Fees Privilege
- Register New User
- Return Items Only
- Upload Offcirc Privilege
- User Manager Update
- View Demerits Tab Privilege
- View User Statistics Privilege
- Calendar Update
- Change Item Info Privilege
- Circ Desk Operator Limited Privilege
- Circulation Desk Operator Analytics
- Create Daily Report Privilege
- Delete Loan Privilege
- Electronic Inventory View
- Ful Config Utility
- Mark As Lost Privilege
- Override Paging Policy
- Physical Inventory View
- Requests Creator
- Update User Statistics Privilege
- User Identifier Update
- View All Loan History
- View Loan Details Privilege
- Waive Fines Fees Privilege
Configuring the Linked Accounts
## Linked Account Settings

### Linked Account Rules

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Created By</th>
<th>Created On</th>
<th>Updated By</th>
<th>Updated On</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Ex Libris</td>
<td>02/05/2018</td>
<td>Ex Libris</td>
<td>02/05/2018</td>
</tr>
</tbody>
</table>

### Input Parameters

<table>
<thead>
<tr>
<th>Name</th>
<th>Operator</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source Institution</td>
<td></td>
<td>Training - Member 2 - Clean</td>
</tr>
</tbody>
</table>

### Output Parameters

- **User Group**: Please select a value
- **Expiry Date**: 
- **Expiry From Source**: 
- **Refresh Expiry Date**: No
- **Purge Date**: 
- **Purge After Expired**: 
- **Refresh Purge Date**: No
- **Resource sharing library**: 
- **Copy Network Blocks**: No
# Restricted Users

## Unexposed User Groups

<table>
<thead>
<tr>
<th>Table code</th>
<th>UnExposedUserGroup</th>
<th>Table Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patron Facing</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Customization mode</td>
<td>Entire table needs to be customized</td>
<td></td>
</tr>
</tbody>
</table>

## Filter: **English**

<table>
<thead>
<tr>
<th>Enabled</th>
<th>Move Up</th>
<th>Move Down</th>
<th>Code</th>
<th>Description</th>
<th>Translation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td>Community Borrower</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td>Undergraduate Student</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Cross Consortia Identifiers

- Use cross consortia identifiers
  - Primary consortia identifier: Primary identifier
  - Additional identifiers:
    - Additional ID 02
    - Additional ID 03
    - Barcode
    - Campus Access
    - Facebook ID for social login
    - Google ID for social login
    - System number
Next Steps and Support Resources
Next Steps and Support Resources

- [https://knowledge.exlibrisgroup.com/Alma/Product_Materials/Overview_Materials/More_Information_About...](https://knowledge.exlibrisgroup.com/Alma/Product_Materials/Overview_Materials/More_Information_About...)

- [https://developers.exlibrisgroup.com/alma/integrations/resource_sharing/p2p](https://developers.exlibrisgroup.com/alma/integrations/resource_sharing/p2p)

- [https://developers.exlibrisgroup.com/alma/integrations/resource_sharing/broker](https://developers.exlibrisgroup.com/alma/integrations/resource_sharing/broker)

- Additional support resources within the ExLibris Ecosystem:
  - [Idea Exchange](https://idea-exchange.exlibrisgroup.com)
  - [Developer Network](https://developers.exlibrisgroup.com)

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Any Questions?
THANK YOU