Resource Sharing: Local, Regional, National, and Global

Moshe Shechter | Alma Product Manager
Alma Resource Sharing – Current Facts
Current Facts

Resource Sharing is supported today in a range of different workflows and involves a variety of different systems. Main workflow types include:

- **Broker based integrated workflow**, involving systems such as ILLiad, Relais ILL/D2D, Inn-Reach or national and regional systems
- **Peer to peer consortial borrowing**, implemented by NA consortia
- **Peer to peer resource sharing by non consortial libraries**, such BIBSYS libraries and Australian libraries relaying requests through Libraries Australia Document Delivery (LADD).
- **Direct services between libraries**, some of which utilize direct requesting options for patrons of one library that use the catalog of another library to place requests, and some of which only allow walk in services
Current Facts

The Alma resource sharing functionality utilizes a range of automation tools that empower automated rotas and request management tools. Using these tools, libraries have managed the below number of requests during 2015/2016 in the different Alma data centers.

![Bar chart showing borrowing and lending requests for 2015 and 2016 by region.]

- **Borrowing Requests**
  - **North America**: 2015 - 721,673, 2016 - 1,112,758
  - **Europe**: 2015 - 0, 2016 - 0
  - **Asia Pacific / Australia**: 2015 - 0, 2016 - 0

- **Lending Requests**
  - **North America**: 2015 - 721,673, 2016 - 1,112,758
  - **Europe**: 2015 - 0, 2016 - 0
  - **Asia Pacific / Australia**: 2015 - 0, 2016 - 0

**Sum**

- **North America**: 2015 - 721,673, 2016 - 1,112,758
- **Europe**: 2015 - 0, 2016 - 0
- **Asia Pacific / Australia**: 2015 - 0, 2016 - 0
The Future is not far away
Currently ...
Imagine the patron getting an email with a link to the article, shortly after placing the request, and after no human intervention in the process!
The Future ...
The Future ...

• On the borrower side:
  ➢ Less time
  ➢ Higher fulfillment rate
  ➢ Less human intervention -> Less errors
  ➢ Less maintenance of partners list

HAPPIER PATRON !

• On the lender side:
  ➢ Less waste of time for unfillable requests
  ➢ Less costs – no digitization
  ➢ No staff time on digitizing and shipping

HAPPIER STAFF !
Service Types
Brokers

- Z39.50
- NCIP
- OpenURL

Resource Sharing Communications
Brokers Usage (1)

• Unmediated library resource sharing partnerships encompassing a number of academic institutions
Broker Usage (2)

- Global\National interlibrary loan automation services
Broker Usage

Broker Usage (1)

Broker Usage (2)
Peer to Peer (P2P)

- ISO 10160/10161
- NCIP
- ARTEMail
- BLDSS APIs
- Email

Alma

© 2016 Ex Libris | Confidential & Proprietary
• Used for direct requesting. At times also used via national or regional gateways.
Peer to Peer (P2P) Usage

P2P Usage (1)

P2P Usage (2)
Fulfillment Network

- Return
- Borrow
- Request
Fulfillment Network Attributes

- 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 at any institution**.

- 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 – Considerations

• The Fulfillment Network lowers the library involvement in terms of configuration, maintenance of supplier lists and in terms of staff mediation of the requests.

• Patron information may be 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
  - Return Anywhere
  - Direct Requesting
  - Pick up Anywhere
  - Consortial patron card in Primo
Enhanced Fulfillment Network

- Return
- Pickup
- Borrow
- Request
Bringing It All Together
• What if I have partners of more than one type?
Bringing it Together

• What if I have partners of more than one type?

Broker/P2P Usage (1)

Broker/P2P Usage (2)
Bringing It Together

Fulfillment Network (Consortial)

P2P (regional)

Broker (regional)

P2P

Broker
Bringing It Together

Fulfillment Network (Consortial)

P2P (regional)

P2P
Fulfillment Network (Consortial)

Broker (regional)

P2P (regional)

---Original Message---

From: Moshe Shechter [mailto:Moshe.Shechter@exlibrisgroup.com]

Date: Thursday, December 24, 2015 9:51 AM

To: I

Subject: RE: RE: SR 1-2979758098 ILL direct request

Hi,

I would be very grateful if you could also relate to the option for other systems to continue using Direct Request with WorldShare.

Thank you,

Moshe Shechter
Alma Product Manager
Tel: +972-2-6495433
Mobile: +972-54-4593161
Moshe.Shechter@exlibrisgroup.com

SUPPORTED USE CASES

- Send borrowing requests to Rapid (Mediated or unmediated) if local holdings check
- Retrieve borrowing queue that are bad citations, return
- Retrieve borrowing requests that are still pending
- Set requests to FII, Unfulfilled, Cancelled, Delayed
- Retrieve lending pending requests that need a round of some pages from previous request
- Retrieve lending requests that Rapid cannot fill, not available queue
- Retrieve borrowing or lending requests history
- Query Rapid from Lending request to return catalog information

OCLC
Shared Configurations
Shared Configurations

Alma allows two levels of configurations sharing between institutions:

• Network Zone sharing
  • Based on the NZ
  • Examples are resource sharing partners and locate profiles, code tables, vendor files and more.

• Community Zone sharing
  • Based on CZ
  • Examples are normalization rules and Analytics reports
Shared Configurations

A basic resource sharing system requires a number of configurations, including:

- Partner records
- Rota Templates
- Locate Profiles
- Rota Assignment Rules
- Send rules
- Workflow Profiles

Some of these configurations may be local in nature and describe a specific library’s policies and workflows. Some of them bear no information that is specific to a given institution.
Global Partner List
Leveraging on Alma Cloud Data
Leveraging on Alma Cloud Data

• In 2016 Alma has passed the mark of **500 live Alma institutions**, managing over **500 million bibliographic records**

• Imagine a patron placing a request for a resource, and getting an email with temporary access to the resource from a remote library neither she nor the library staff ever heard about, in a manner of seconds!

• If the request could only be forwarded to the right potential lender ...
Beyond the partners that the library has opted to regularly work with, there may be available resources that are owned by other libraries in Alma’s cloud. It should be possible to suggest these options, if the library would like to (and the lenders are willing ... )
Shareable Content
Sharable Content

- Digital Shipment Alma Document Delivery
Sharable Content

• Enhance locate profiles to locate based on **electronic coverage & license information**
  • Alma locate profile will be able to check potential supplier also for electronic content based on coverage information and the request information
  • Improve coverage testing when determining self ownership and lending locate

• Ship already digital content
  • It will be possible, from the Manage Fulfillment Options option, to ship already digital content as a link or as an attachment as per the Digitization Profile Rules
THANK YOU
Moshe.shechter@exlibrisgroup.com