Fulfillment Networks

Resource Sharing Your Way

Moshe Shechter || Senior Alma Product Manager
• General Concepts
• Manual Peer to Peer Fulfillment Network
• Automated Fulfillment Network (actually a hybrid network ...)
• Plans
General Concepts
The Classic Library
The New Library

- Walk In Loan
- Return Anywhere
- One Library Card
- Pickup Anywhere
The New Library

Some sharing of user information

Patron controls:
• Which users’ information is shared
• What information is shared

Do I want my information shared?

Source controls:
• Which users’ information is shared
• What information is shared

Target controls:
• How long will information be retained

Source & Target controls:
• Will patron blocked at source be blocked at target

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In this model there is a ‘Primary’ record and a ‘Secondary’ record.
Sharing User Information (Model 1)

Primary and secondary library

Institution A → Discovery → Request → Institution B

Login

Linked account

Sharing User Information (Model 1)
Sharing User Information (Model 1)

Primary and secondary library

Institution A

Borrow

Institution B

Linked account
Sharing User Information (Model 1)
Primary and secondary library

• Refresh happens when linked account is active – borrows or requests
  • Updates are not pushed from Primary to Secondary the moment they are updated at the Primary record
Sharing User Information (Model 1)

Primary and secondary library

• What’s copied?
  • General Information
  • Contact Information
  • Blocks (optional)

• What’s not copied?
  • Notes
  • Identifiers (unless configured to share)

• Locally set rules determine (may be set per copy source):
  • Local expiry date
  • Local purge date
  • Local user group
  • Local resource sharing library
  • Whether to copy block
Sharing User Information (Model 2)

Floating patron record

The Primary ID is unique and shared across the consortia. An additional ID type may be used as consortial ID

Institution A

ID=12345678

SIS Feed

Institution B

ID=12345678

SIS Feed
Sharing User Information (Model 3)

Centrally shared record

SIS Feed

Network Zone

ID=12345678

Institution A

Institution B
Sharing User Information (Model 3)

Centrally shared record

Network Zone

ID=12345678

Copy/Refresh record

ID not found

Institution A

• Login
• Request
• Loan

ID=12345678

Institution B
Sharing User Information (Model 3)

Centrally shared record

SIS Feed

Network Zone

ID=12345678

Refresh record

Institution A

Institution B
Sharing User Information (Model 3)

Centrally shared record

Synch is using the same model as SIS synch – overriding external segments and leaving local segments.

Local updates

Purge is a local process
The New Library

Patron Record

• Target controls
  • Loan
  • Request
  • Fee
  • Block

Patron Record
The New Library

Patron Record

**Source controls:**
- Which users’ information is shared
- What information is shared

**Target controls:**
- How long will information be retained

**Patron controls:**
- Do I want my information shared?

**Source & Target controls:**
- Will patron blocked at source be blocked at target

**Target controls:**
- Loan
- Request
- Fee
- Block

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Loans by Guest Patrons in 2018

<table>
<thead>
<tr>
<th>Region</th>
<th>Loans</th>
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</thead>
<tbody>
<tr>
<td>APAC</td>
<td>14,664</td>
</tr>
<tr>
<td>EU</td>
<td>38,250</td>
</tr>
<tr>
<td>NA</td>
<td>49,494</td>
</tr>
<tr>
<td>Grand Total</td>
<td>102,408</td>
</tr>
</tbody>
</table>
Manual Peer to Peer Fulfillment Network
P2P Request for Pickup Anywhere
P2P Request for Pickup Anywhere

behind the iron curtain

Behind the iron curtain
Poddebski, Karol.; Bello, Hillaire, 1870-1953, former owner.
1946
Out of library

Subversive adaptations : Czech literature on screen behind the Iron Curtain
Bubeníček, Petr, author.
2017
Check for available services
P2P Request for Pickup Anywhere

How To Get It

REQUEST: Request / Digitization / Resource Sharing / Purchase Request / ILLiad / OCLC Navigator / Relais D2D

LOCATION ITEMS

Main Library
Out of library, General
(1 copy, 0 available, 0 requests)

On loan until 03/01/2019 21:00
One Week Loan

GET IT OTHER

LOCATION ITEMS

REGISTER

Central Library
Available, General
(2 copies, 1 available, 0 requests)

In transit until 21/02/2019
Loanable

Item in place
Loanable
## P2P Request for Pickup Anywhere

### Find and Manage Users

<table>
<thead>
<tr>
<th>Name</th>
<th>Account Type</th>
<th>Record Type</th>
<th>User Group</th>
<th>Status</th>
<th>Expiration date</th>
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<tr>
<td>Shechter, Moshe</td>
<td>External</td>
<td>Public</td>
<td>-</td>
<td>Active</td>
<td>03/09/2020</td>
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</table>
## P2P Request for Pickup Anywhere

### How To Get It

**REQUEST:** Request / Digitization / Resource Sharing / Purchase Request / ILLiad

##### BACK TO LOCATIONS

### LOCATION ITEMS

- **Main Library**
  - Out of library, General
  - (1 copy, 0 available, 0 requests)
  - On loan until 03/01/2019 21:00
  - One Week Loan

### GETIT OTHER

##### BACK

**REQUEST:** Request / Digitization

##### BACK TO LOCATIONS

### LOCATION ITEMS

- **Central Library**
  - Available, General
  - (2 copies, 1 available, 0 requests)
  - In transit until 21/02/2019
  - 4 Week
  - Item in place
  - 4 Week
P2P Request for Pickup Anywhere
P2P Request for Pickup Anywhere
P2P Request for Pickup Anywhere

Requested For: Shechter, Moshe

Resource Request Slip Letter

Request ID: 202889870000193

Requested For: Shechter, Moshe

Behind the iron curtain,
By: Poddebiski, Karol.

Location: General

Destination: University of Knowledge - Main Library
Request Type: Patron physical item request
# P2P Request for Pickup Anywhere

![Image of P2P Request for Pickup Anywhere](image)

## Scan In Items

- **Scan in Items**
  - **From another institution**: Yes
  - **Institution**: Open University
  - **Scan item barcode**: OU54

## Results

<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>Behind the iron curtain, by Karol Poddebski.</td>
<td>On Hold Shelf</td>
<td>OU54</td>
<td>Patron physical item request</td>
<td>Shechter, Moshe</td>
</tr>
</tbody>
</table>
On Hold Shelf Letter

Shechter, Moshe
University of Ex Libris
Alma Avenue

Hamburg
Hamburg 666789
NA Null

Dear Sir/Madam Shechter

The following item, which you requested on 24/02/2019, can be picked up at [University of Knowledge] - Main Library - Default Circulation Desk Circulation Desk.

The item will be held for you until 08/03/2019.

Behind the iron curtain.
By: Poddecki, Karol.

Notes that may affect loan:

Sincerely
Circulation Department
P2P Request for Pickup Anywhere
P2P Request for Pickup Anywhere

The items destination is:

The item's destination is: Open University institution, Central Library
Automated Fulfillment Network
(actually a hybrid network...)

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# Automated Fulfillment Network

## Template Members

### HYBRID

<table>
<thead>
<tr>
<th>Name</th>
<th>Hybrid Rota</th>
<th>Type</th>
<th>ORDERED</th>
<th>Status</th>
<th>ACTIVE</th>
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<tbody>
<tr>
<td>University of Knowledge - Fulfillment Network</td>
<td>U_ofLK_FN</td>
<td>Fulfillment Network</td>
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<tr>
<td>ILLiad</td>
<td>ILLIAD</td>
<td>NCIP</td>
<td></td>
<td>Active</td>
<td></td>
</tr>
</tbody>
</table>

### General Information

- Add Partners
- Place At/Before

### Notes
Automated Fulfillment Network
Automated Fulfillment Network

Pages to photocopy:  

Delivery Information:  
Format:  
  - Physical
  - Digital
  - Physical non-returnable

Requested Media:  

Delivery Location:  
  - Deliver to library
  - Alternative address

Preferred Pickup Institution:  
University of Knowledge  

Preferred Pickup Location:  
  - Main Library

Allow Other Library:  

Preferred Local Pickup Location:  
Main Library
Automated Fulfillment Network

Resource Sharing Borrowing Requests (1 - 1 of 1)

Assigned to Me  Unassigned  Assigned to Others

Author ▼ Activity Status : Active ▼ Creation Date : Today ▼ Clear all

Select All

1. Behind the iron curtain,
   Book By Poddoby, Karol. (J Rolle Book Co 1946.)
   OCLC Number: 10653500
   LCCN: 47022949
   Pages: 68 p.
   MMS ID: 99228910700121

   External identifier: EXLDEV10002573
   Internal Identifier: 4381458000000121
   Request Status: Ready to be sent
   Partner: University of Knowledge - Fulfillment Network
   Requested Media: Any
   Requester: Moshe Shechter
   Pickup At: Main Library
   Requested Format: Physical
   Creation Date: 02/25/2019
   Update Date: 02/25/2019

Other details
# Automated Fulfillment Network

## Resource Sharing Borrowing Request

**Partner Name:** University of Knowledge - Fulfillment Network

**External identifier:** EXLDEV10002578

### General Information

<table>
<thead>
<tr>
<th>Name</th>
<th>Code</th>
<th>Profile Type</th>
<th>Status</th>
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</thead>
<tbody>
<tr>
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<td>U_of_K_FN</td>
<td>Fulfillment Network</td>
<td>Active</td>
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<td>Open University</td>
<td>OU</td>
<td>ISO</td>
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<tr>
<td>ILLiad</td>
<td>ILLIAD</td>
<td>NCIP</td>
<td>Pending</td>
</tr>
</tbody>
</table>
Automated Fulfillment Network
Automated Fulfillment Network
Automated Fulfillment Network
Automated Fulfillment Network
Automated Fulfillment Network
Automated Fulfillment Network

Request Id: EXLDEV10002579

almauni25@gmail.com
to me

Request Type: Loan
Author: Poddebkski, Karol.
Title: Behind the iron curtain,
LCCN: 47022949
OCLC Number: 10553500
Place of Publication: London,
Publisher: J. R. Mohan
Publication Date: 1946.
Pages: 68 p.
Specific Edition Only: true
Requested Format: PHYSICAL
Requested Media: Any
Allow Other Format: false
Requested Pickup Location: Main Library
For Reading Room Use Only: false
Willing to Pay: false
Needs Patron Information: false
External ID: EXLDEV10002579
Institution: Alma University
Plans
Consortial Unique Item Barcodes

- We will add the ability to define a Fulfillment Network as working with a **network unique item barcodes**.
- This means that a Fulfillment Network will no longer have to choose an owning institution.
- If the network is set to **FULL** uniqueness then the Item Owner dropdown will not be visible.
  - Alma will use the Barcode and search for it in all participating institutions.
Consortial Unique Item Barcodes

• We will add the ability to define a Fulfillment Network as working with a network unique item barcodes.
• This means that a Fulfillment Network will no longer have to choose an owning institution.
• If the value is PARTIAL, then the Item Owner dropdown will be visible with all the institutions that participate in the FN.
  • A new value ‘All Institutions’ will be added to in the dropdown list
Consortial Unique Item Barcodes

• We will add the ability to define a Fulfillment Network as working with a **network unique item barcodes**.

• This means that a Fulfillment Network will no longer have to choose an owning institution.

• If the value is PARTIAL, then the Item Owner dropdown will be visible with all the institutions that participate in the FN.
  
  • In case more than one match exists, Alma will open a light box, populated with a list of all titles, institutions and libraries that own this barcode.
Patron ID automatic identification rules

• Rules will define which institutions to query when a barcode is scanned in based on
  • Prefix
  • Length of ID
• Query IDs across all institutions without having prefix information that identifies the institution
• Allowed only for privileged staff
Perform Locate Based on Electronic Coverage

February 2019 Fulfillment - Resource Sharing

The locate process was enhanced to check the rota members' electronic resources' coverage. If the borrower resource sharing request is submitted with volume/issue information and the locate profiles are not set to ignore electronic resources, Alma runs the locate action on the request's rota using the volume/issue information. This is similar to how the Alma link resolver finds services in the lender's catalog. The locate process includes only partners for which the matching electronic resource has coverage information that matches the volume/issue information on the borrower request.

When defining the parameters for locate profiles, the **Ignore Physical Resources** field is now available. Selecting this field means that the locate process does not check physical resources and does not use the **locate by**, **check item availability**, or **requestability** fields.

The locate process now functions as follows:

- **When Ignore Physical Resources** is not selected and **Ignore Electronic and Digital Resources** is selected, Alma performs the locate process only for physical resources based on the bibliographic record.

- **When Ignore Physical Resources** is selected and **Ignore Electronic and Digital Resources** is not selected, Alma performs the locate process only for electronic resources, similar to how the link resolver works, using the request's volume/issue information and the lender's coverage data.

- **When Ignore Physical Resources** and **Ignore Electronic and Digital Resources** are both unselected, Alma performs the locate process for physical resources based on the bibliographic record, and for electronic resources similar to how the link resolver works, using the request's volume/issue information and the lender's coverage data. The electronic locate check is performed first.

In order to make the locate process for electronic resources consider coverage information similar to how the Alma link resolver would find services, you must set the **rs.uresolver.locate** parameter to true (See Configuring Other Settings (Fulfillment)).
Hi Moshe,

You are correct! That API endpoint is exactly what you need and I’d be happy to help you get it working.

From: Moshe Shechter <Moshe.Shechter@exlibrisgroup.com>
Sent: Sunday, January 6, 2019 10:51:45 AM
To:
Subject: RE: Alma email import and Primo OpenURL linking

Hi,

We have been in contact some time ago, regarding integrations between Alma and ILLiad, specifically for the purpose of pushing borrowing requests that have been created in Alma into ILLiad, so that they continue their lifecycle as borrowing requests managed in ILLiad. A number of Alma institutions have been successful at implementing this by using a structured email that Alma generates for ILLiad to upload.

I am wondering whether there is an API equivalent service we can be looking at. My understanding of the ‘Create a transaction request’ API that is described at https://prometheus.atlas-sys.com/display/ILLiad/The+ILLiad+Web+Platform+API is that a RESTful call from Alma to ILLiad could be able to do that. Is my understanding correct?
I am eager to replace our current email based integration with a RESTful equivalent.
THANK YOU!