Introductions

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With Ex Libris for 14 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 sessions 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

Agenda

1. Basic Terminology and Configuration Elements
2. Broker Workflows and Integrations
3. Peer to Peer Workflows
4. Fulfillment Network Workflows and Configurations
5. Next Steps, Support Resources and Survey
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.

- 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.
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
The Resource Sharing Library

- 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.
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:
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:

  - Configuration at my institution
  - The Holdings Code on the partner record matches a campus code at the other 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
- Locate Profile
- Integration Type
- Workflow Profile

- Email
- ISO
- ARTEMail
- SLNP
- NCIP P2P
- BLDSS
- Alma
- Z39.50
- BLDSS
- Local
- Shared Catalog

The Partner Record

- Borrower Institution
- Request
- Temporary Item
- Loan

Rota

1. Partner Integration Type
2. Integration Type
3. Integration Type

Locate Profile Workflow Profile
Locate Profile Workflow Profile
Locate Profile Workflow Profile
The Partner Record

Lender Institution

Request

Item Moved to Temporary Location

Partner
Integration Type
Workflow Profile

Locate Profile
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

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.)
Broker Workflows and Integrations

Basic Layout

Borrower Library

Lender Library
Basic Layout

Overview And History

NIILDE - Network Inter Library Document Exchange

http://nilide.bo.cnr.it/

ISO 000 books music
sold during which the
statement. The BorrowDirect
membership exceeded 100,000.

Basic Layout
Integrations

- Z39.50 (OPAC)

Integrations

- OpenURL
- Static URL
Integrations

Broker Workflow
Requesting (1) - Direct

- Single requesting point for patron
- Depends on patron privilege
- Checks patron blocks
- May depend on previous login

Requesting (2) – Partner Setup

- Online access
- Alma University
  - Your search did not match any physical resource in the library
  - Use the links below in order to request the resource from other libraries
  - Relay D2D

Advantages:

- Single requesting point for patron
- Depends on patron privilege
- Checks patron blocks
- May depend on previous login
Requesting (3) - GES

Advantages:
- Single requesting point for patron
- May make use of additional conditions

Requesting (4) - Push

Author: John F. McMuller
Title: Running your small business
ISBN: 0742-6550
LCCN: sn 80000096
OCLC Number: 10395453
Place of Publication: [Portland, Or.]
Publisher: The Business Journal of Portland Inc.
Publication Date: c1984-
Note: At head of title: Portland.
Note: Title: The Business Journal.
Author of Article: John F. McMuller
DOI: 10.4411
PMID: 045421
Specific Edition Only: true
Requester: exl3jml
Preferred Send Method: MAIL
Date Needed By: 2013-07-30
Requested Pickup Location: Main Library
For Reading-Room Use Only: false
Shipping Cost: 35
Willing to Pay: true
Agree to Copyright terms: true
Newspaper Patron Information: false
External ID: EKLDV10000023
Institution: Main Campus
Requesting (4)
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 Requesting – (2)

Message may include:
• ISBN/ISSN
• OCLC Number
• MMS ID

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

Lender Shipping

Message may include an indication that the shipment is digital.

In this case, the request will be closed

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
**Borrower Receiving**

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

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**Borrower Renew Request (1)**

CirculationStatusUpdate (Pending Renewal)
Borrower Renew Request (2)

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

Alma will respond with calculated date, or use broker supplied date.

Lender Renew 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**

- **Alma**
- **Borrower Library**
- **CirculationStatusUpdate (Renewed/Rejected)**

**Renew Process**

- **Primo**
- **Borrower Library**
- **Lender Library**
- **CirculationStatusUpdate (Renewed/Rejected)**
- **RenewItem**
Recall Process

Borrower Library

RecallItem

RecallItem

Lender Library

Primo

Borrower Return Item

CheckInItem

Alma

Borrower 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)
Lender Check In

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

CancelRequest
Peer to Peer Workflows

Resource Sharing in Alma

BORROWER
Institution
Resource Sharing Library
Stub item – owned by resource sharing library

LENDER
Institution
Resource Sharing Library

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Resource Sharing Network

Resource Sharing in Alma

Demo
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

- 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
Fulfillment Network - Workflows

Fulfillment Network

Fulfillment Network
Fulfillment Network Workflow

Request → We all lost the cold war → Loan/Return

Patron Logs In at U of Washington

Login screen with fields for Name, Password, and Institute selected to Washington University.
Patron Changes to View Western Washington Holdings

Request is for Pick Up at Oregon State
Fulfillment Network Workflow

Request

We all lost the cold war

Patron Information is Copied!

Abel, Brian
Request is Registered at Western Washington ...

... and Pick Slip is Printed
Item is Wanded in ...

... and Put in Transit

Item is in Transit
Fulfillment Network Workflow

We all lost the cold war

The Requester is not known at Oregon State ...

But that is about to change ...
Item is Wanded in at Oregon State ...

... and Put on Hold Shelf

Back Home, Item is Tracked
Patron Comes to Collect the Item …

... and is Automatically Registered
Loan Can Go On (with Western’s Item !)

Back Home, Item is Tracked
We all lost the cold war

Abel, Brian

Fulfillment Network Workflow

Patron Can Return Where Picked Up!...
Item is Finally Home!

Fulfillment Network Workflow

We all lost the cold war

Abel, Brian

Request

Loan/Return

Ship

Return
Services are Exposed in Primo

Configuring the Fulfillment Network
Configuring the Fulfillment Network

Members (possible in NZ)
Library Serves Other Institution

Pickup at Any Institution
Consortial Services Privilege

Configuring the Linked Accounts
Cross Consortia Identifiers

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)

Q & A

Any Questions?
Session Survey Evaluation

Please use the following link https://www.surveymonkey.com/r/techsem2017 to provide feedback on your sessions.

THANK YOU