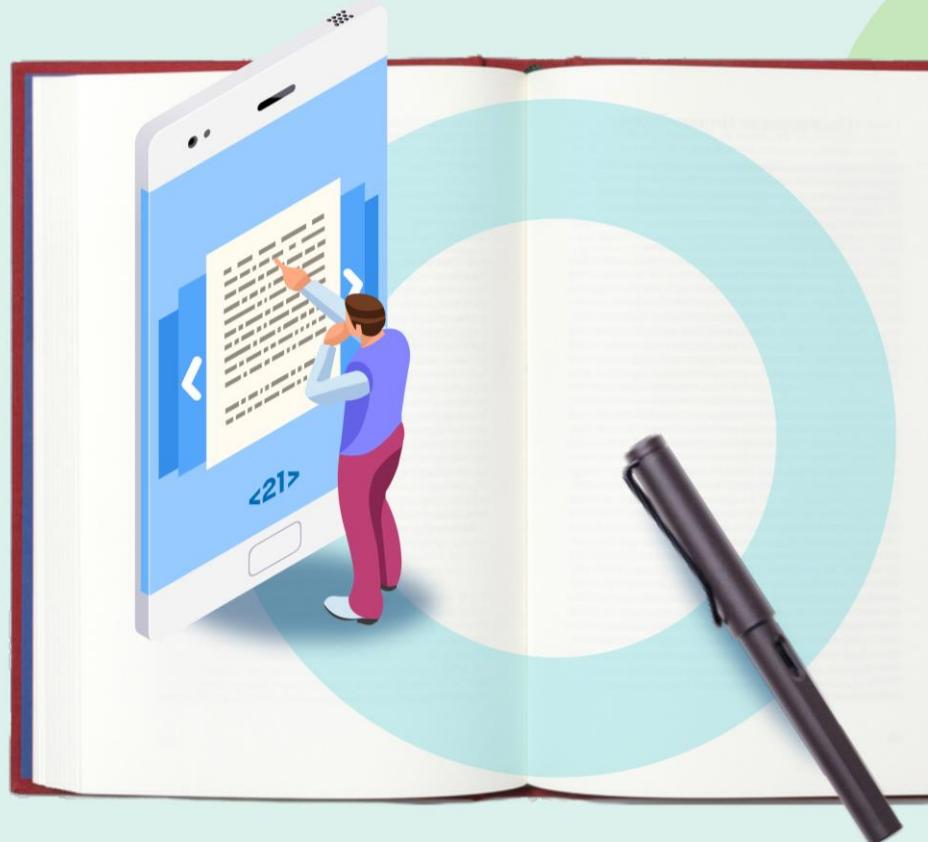


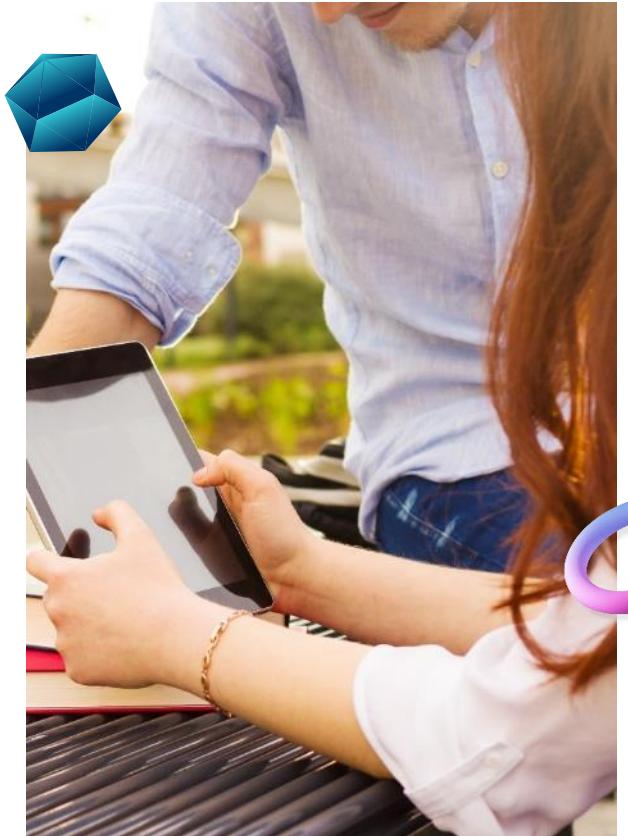
Resource Sharing in Alma for UK/Ireland Institutions

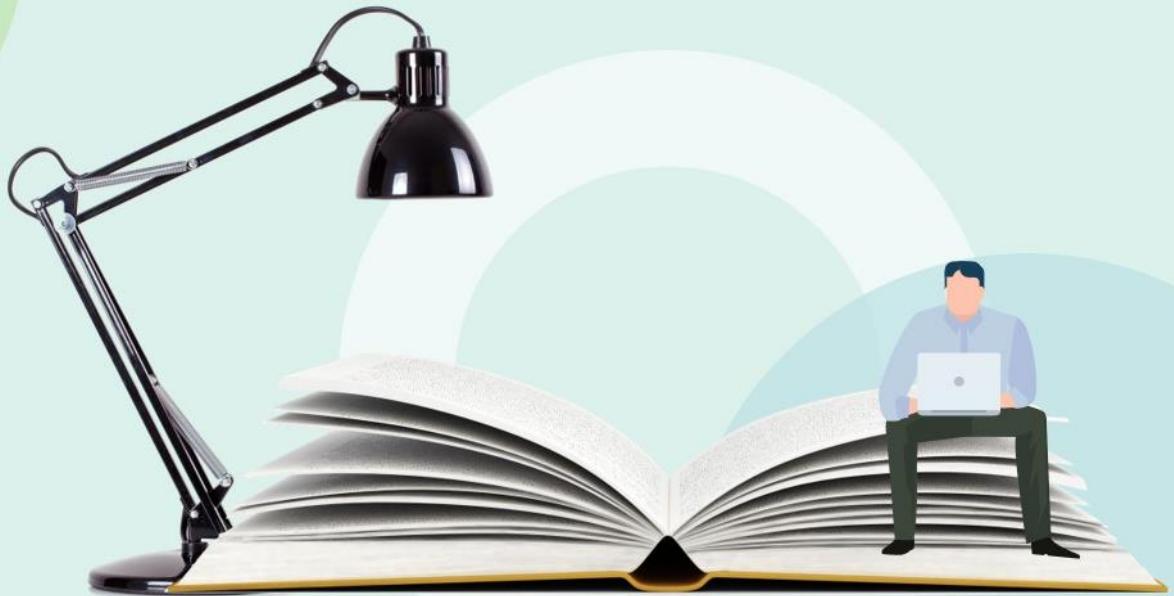
Stephen Bowman, Alma Implementation
Consultant



Resource Sharing in Alma

- A point in history of UK inter-library loans
- Status
 - What options are there in the UK/Ireland for Inter-Library Loans with Alma
- Implementations
 - BLDSS API
 - Rapid-ILL
- Configuration elements
 - Further explanation about some of the configuration of resource sharing in Alma





Inter-Library Loans – 25 Years of ILL's

Inter-Library Loans History – Libris to Ex-Libris

In 1996 – The Simpsons aired on BBC2 for the first time:



Inter-Library Loans History – Libris to Ex-Libris

In 1996 – Take That split is announced:



Inter-Library Loans History – Libris to Ex-Libris

In 1996 – Dolly The Sheep was born (left):



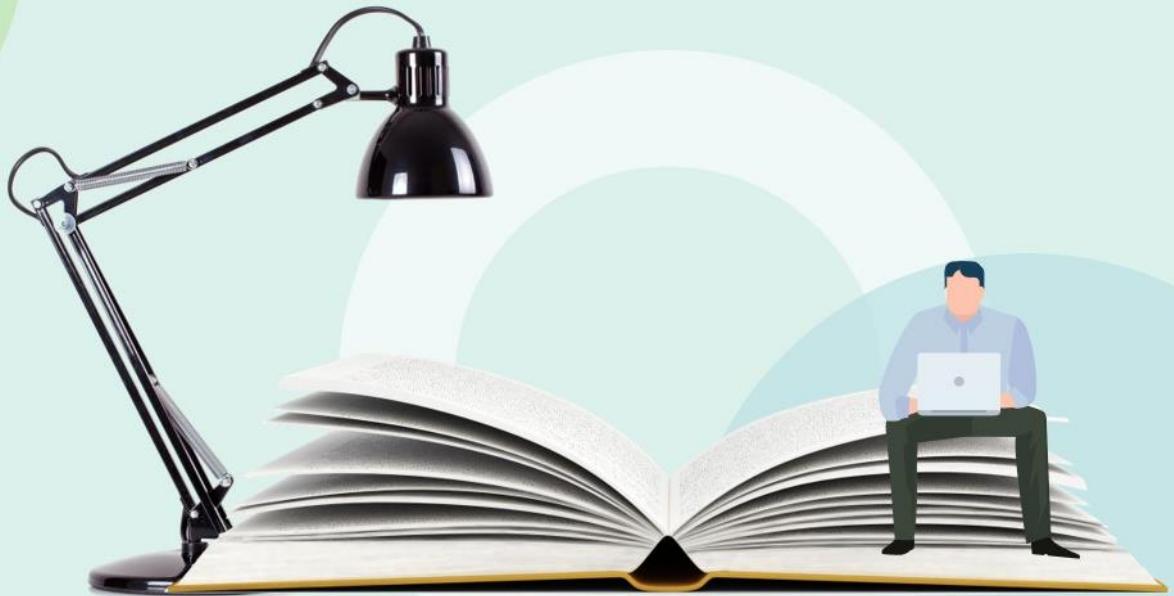
Inter-Library Loans History – Libris to Ex-Libris

Also in 1996...

- There were national inter-library loans databases and one such was Unity.
- The Unity database was delivered into libraries using a MS-DOS-based application that allowed library staff to search for titles.
- The software had a built-in ARTtel transmission mechanism to send requests to the British Library
- Updates to the database were delivered via cassettes to libraries across the UK from a software house in Berwick-upon-Tweed
- The name of the software company was “Libris Computing Limited”

Inter-Library Loans History – Libris to Ex-Libris

- My first ever job was as a C programmer at Libris Computing
- The first project I worked on was designing and coding a UKMARC cataloguing program in MS-DOS
- My first task in that project was to deliver a picklist mechanism for authority-controlled fields so that, for example, you did not end up with multiple versions of “Catherine Cookson” across the UKMARC records
- Libris was liquidated in August 1998
- Completing the journey ex-Libris to “Ex-Libris”.



Alma Resource Sharing - Status

Alma Resource Sharing Status

Partner Types – British Library:

- BLDSS – API
 - Some level of automation
- ARTEmail
 - Legacy method
 - Still functional but there are known issues

Alma Resource Sharing Status

Partner Types – British Library:

- BLDSS API
 - Alma can automatically send the request – Sending Borrowing Request Rules -
[https://knowledge.exlibrisgroup.com/Alma/Product Documentation/010Alma Online Help \(English\)/030Fulfillment/080Configuring Fulfillment/090Resource Sharing#Configuring Sending Borrowing Request Rules](https://knowledge.exlibrisgroup.com/Alma/Product Documentation/010Alma Online Help (English)/030Fulfillment/080Configuring Fulfillment/090Resource Sharing#Configuring Sending Borrowing Request Rules)
 - Alma automatically responds to order updates from the BL
 - Limits to automation: Recalls are not applied automatically in Alma.

Alma Resource Sharing Status

Partner Types – British Library:

- BLDSS API - Recalls
 - The API returns event information and this is shown in the borrowing request in Alma (also appears in the tasklist) and you can assign the status “Recalled By Partner” to it.
 - The “Recall” option from the 3 dots button on the Borrowing Request can then be used to recall the borrowing request item from your patron in the usual way (by changing the due date for your patron)

Alma Resource Sharing Status

Partner Types – British Library:

- ARTEmail
 - As the legacy mechanism for transmission of requests to the British Library, this is still available in Alma
 - But there are known issues with no target for development fix (see next slide)

Alma Resource Sharing Status

Partner Types – British Library:

- ARTEmail (known issues):
 - Author missing for a book request (present for article)
 - Part field not included in book transmission
 - Chapter title not included in book transmission
 - DOI missing/long title truncated from transmission

Alma Resource Sharing Status

Partner Types – Rapid-ILL:

- Document delivery - Articles/Book chapters
- Unmediated borrowing requests unless not as cited (re-submission required) – automated workflow
- Rapid-ILL community of borrowers and lenders
- Seamless from patron side (they don't see a difference in Primo)
- 95% fulfillment rate, 11.2 hours average turnaround time

Alma Resource Sharing Status

Partner Types – Rapid-ILL:

- Pods to define who you are borrowing from/lending to
- Note that there is no sandbox for Rapid-ILL – during implementation you can only test this with real borrowing requests. Lending requests are only possible once the holdings files are shared (see next slide)

Alma Resource Sharing Status

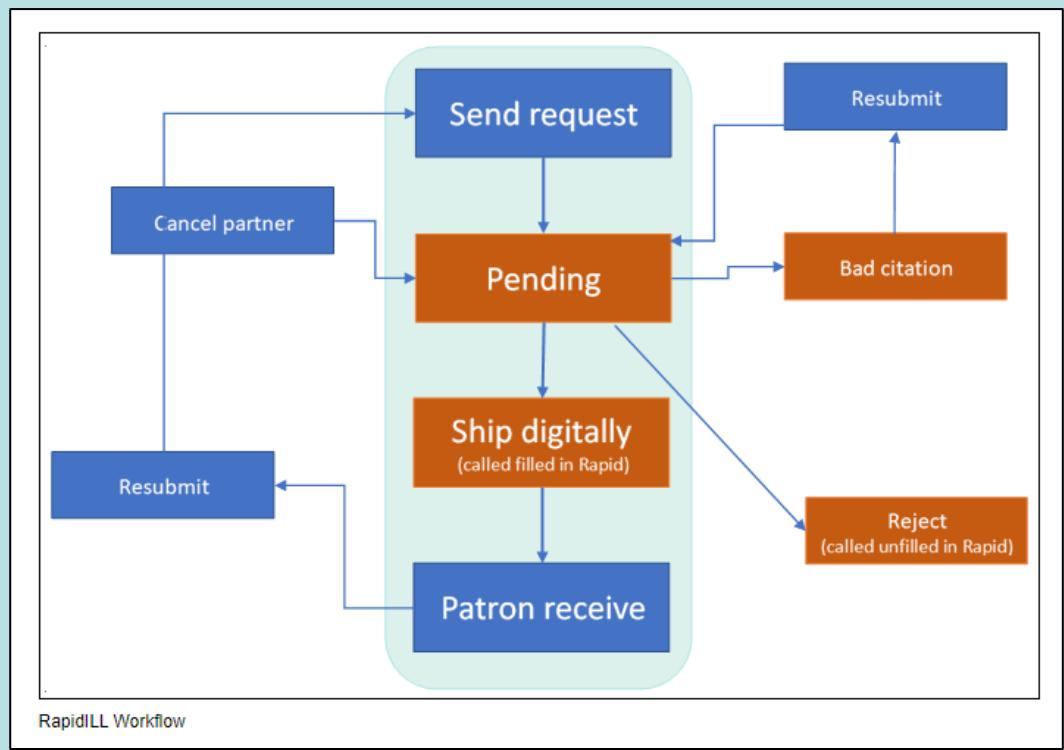
Partner Types – Rapid-ILL:

- Lending requires holdings files to indicate
 - Local resources (not shared) – this can be used so that requests by your patrons are bounced back from Rapid-ILL when you can fulfill them locally
 - Resources to be shared nationally
 - Resources to be shared with any partners



Alma Resource Sharing Status

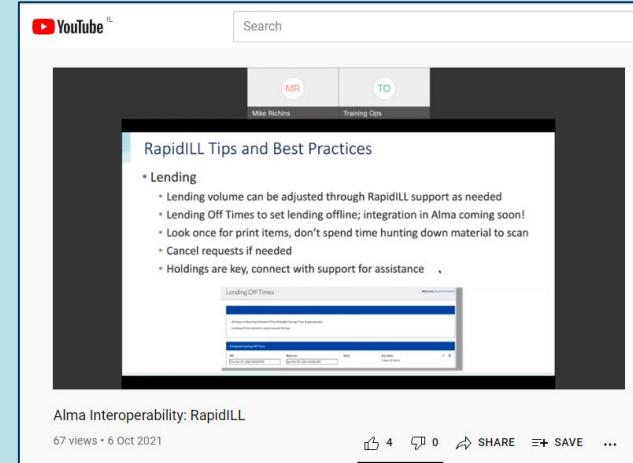
Partner Types – Rapid-ILL:



Alma Resource Sharing Status

Partner Types – Rapid-ILL:

- Video from Mike Richins (6th Oct) -
<https://www.youtube.com/watch?v=Lqa5-urgPM>



Alma Resource Sharing Status

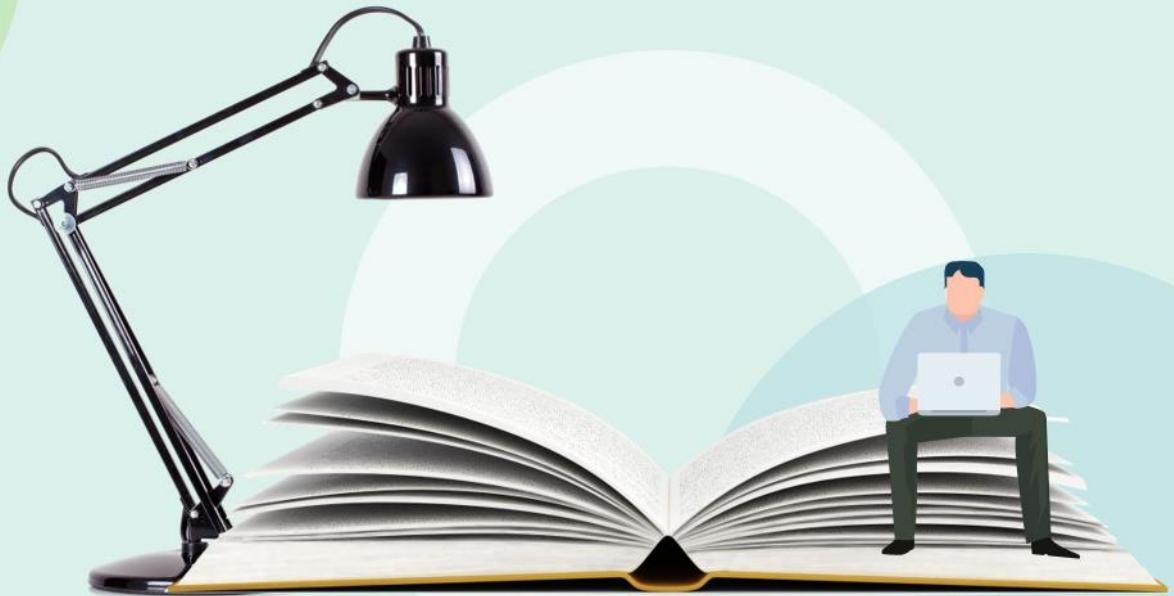
Partner Types – Email:

- Use Email partners for other institutions you borrow from/lend to
- Sometimes you might create an Email partner that is internal to your institution to act as a “last resort” partner. You would include such a partner at the end of your Rota Templates to capture requests that could not be satisfied elsewhere in the rota. In this way you keep the request “alive”.

Alma Resource Sharing Status

Partner Types – Others Types:

- NCIP – work with broker systems
- ISO – communicate with another resource sharing system



Alma Resource Sharing - Implementation

Alma Resource Sharing - Implementation

BLDSS API:

- Can be implemented at any stage
- Documentation:
 - [https://knowledge.exlibrisgroup.com/Alma/Product Documentation/010Alma Online Help \(English\)/090Integrations with External Systems/040Fulfillment/020Resource Sharing Partners/British Library Document Supply Service \(BLDSS\)](https://knowledge.exlibrisgroup.com/Alma/Product Documentation/010Alma Online Help (English)/090Integrations with External Systems/040Fulfillment/020Resource Sharing Partners/British Library Document Supply Service (BLDSS))

Alma Resource Sharing - Implementation

BLDSS API:

- Once you have authorized the API with the British Library you need to contact Ex Libris support so that they can confirm that you will be using the API with your customer code(s).
- Authorization done via “Application Management”
<https://api.bldss.bl.uk/applications/>

Alma Resource Sharing - Implementation

BLDSS API:

- Alma uses the API in 2 ways:
 - Sending a request – happens on-demand for a borrowing request
 - Checking for responses – scheduled job in Alma, “Update BLDSS Requests” runs every 2 hours and processes any updates making changes to your Alma borrowing requests

Alma Resource Sharing - Implementation

BLDSS API:

- There is a test URL (should always be https) that can be used and a generic customer code to go with it -

Partner Record

During testing, you can use the generic test account, using the below credentials.

Account: 73-0006

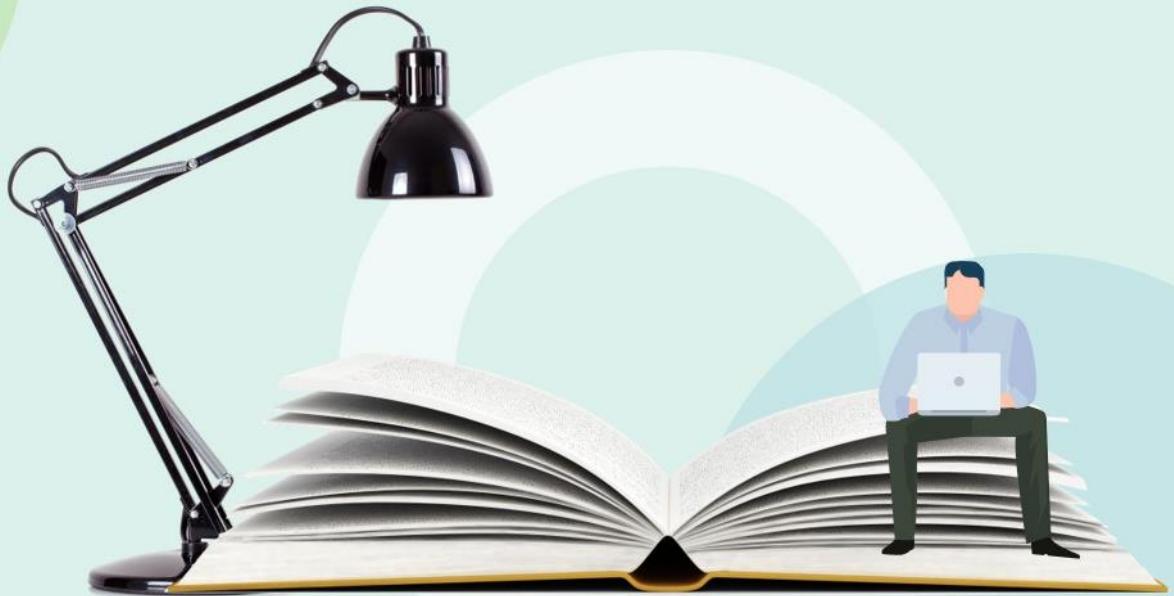
Password: API6789364

Base URL: <https://apitest.bldss.bl.uk>

Alma Resource Sharing - Implementation

Rapid-ILL

- In some cases applied as part of Alma implementation



Alma Resource Sharing – Configuration

Alma Resource Sharing - Configuration

Alma Rota Templates:

- Where a template is assigned to a borrowing request a locate profile is applied for all partners in the rota (when the request is created) and any that cannot satisfy are rejected at that point and are removed from the rota -

[https://knowledge.exlibrisgroup.com/Alma/Product Documentation/010Alma Online Help \(English\)/030Fulfillment/050Resource Sharing/040Locating Items](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/030Fulfillment/050Resource_Sharing/040Locating_Items)

Alma Resource Sharing - Configuration

Alma Workflow Profiles:

- Workflow profiles are divided into Borrowing and Lending actions
- The actions are defined by whether or not we are looking at the process from the Borrower or Lender perspective
- Example:
 - Lender check-in – this indicates whether or not we wait for a request to be manually completed by the lender acknowledging safe return of the loaned item. If not checked the request is assumed completed once we return physical item (i.e. once it has left our institution)
 - Is applied to the “Lending” workflow profile for borrowing requests at our institution
 - [https://knowledge.exlibrisgroup.com/Alma/Product Documentation/010Alma Online Help \(English\)/030Fulfillment/080Configuring Fulfillment/090Resource Sharing#Adding Workflow Profiles](https://knowledge.exlibrisgroup.com/Alma/Product Documentation/010Alma Online Help (English)/030Fulfillment/080Configuring Fulfillment/090Resource Sharing#Adding Workflow Profiles)

Alma Resource Sharing - Configuration

Request Terms of Use – Available for Physical/Digital ILL

- In an Alma Request Terms of Use we see the following values:

5	Is Requestable for Physical Resource Sharing	Requestable for physical resource sharing (Requestable for	▼
6	Is Requestable for Digital Resource Sharing	Not requestable for digital resource sharing (Not requestable	▼

- These values decide if the resources where the request rule applies can be used to satisfy lending requests
- The key issue here is that these values are only relevant where the fulfilment rule does not involve User Group (since there is no “User” from Alma for a lending request)

Alma Resource Sharing - Configuration

Checking of Quota/Limits

- In the Alma Borrowing Request terms of use we have 2 limits:

5	Active resource sharing requests limit	3 active RS requests
6	Yearly resource sharing requests limit	3 RS requests per year

- In Primo we have 2 routes for the patron to create a Borrowing Resource Sharing request:
 - Blank form – request patron for metadata
 - Citation linker (fetch item) – request patron for metadata then perform search, the resource sharing form may appear depending on the results

Alma Resource Sharing - Configuration

Checking of Quota/Limits

- The issue with the limits is that when using the Blank form the limits are checked when the user logs in to Primo but then are not checked again with Alma.
- So this scenario is possible:
 - Patron has used 19/20 requests from their yearly quota
 - Login to Primo and use blank form to send request #20
 - Return to blank form again and send request #21 and so on
- If the Citation Linker (Fetch Item) route is used then the limits are checked when the resource sharing form is created (but not for the blank form)

Alma Resource Sharing - Configuration

Automation steps:

- Rota assignment rules – when a patron creates a request, Alma makes the choice of which rota template to choose for the request. Choice can be made based on:
 - User Group
 - Requested format
 - Required in days
 - Level of Service
 - Price

Alma Resource Sharing - Configuration

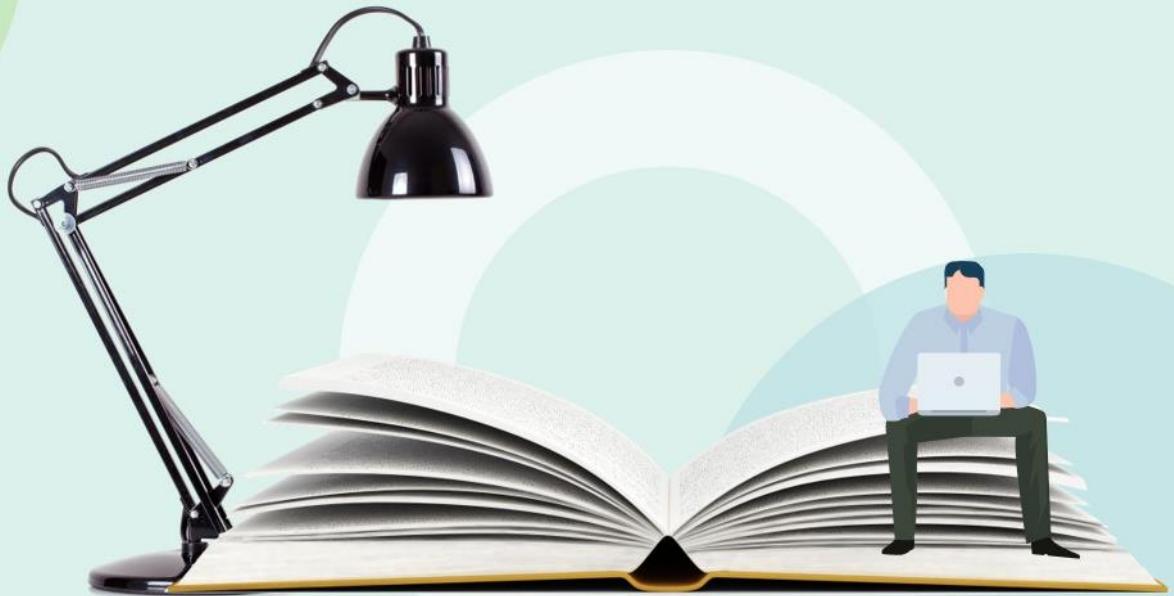
Automation Steps:

- Locate Profiles – Types:
 - Z39.50 – uses one of Alma's defined External Search Resources (you cannot add one "on-the-fly")
 - Alma – another Alma environment
 - BLDSS (to be used with the API)
 - Fulfillment network

Alma Resource Sharing - Configuration

Automation steps:

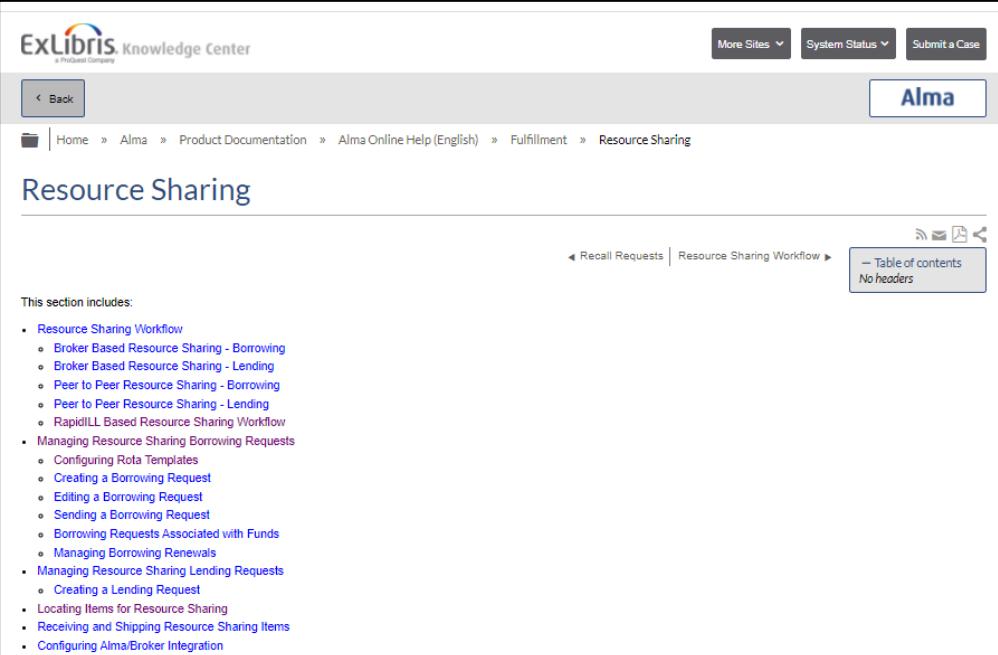
- Sending Borrowing Request Rules -
 - Request is automatically sent to a partner
 - Only happens if locate has been successful



Alma Resource Sharing – Documentation

Alma Resource Sharing - Documentation

[https://knowledge.exlibrisgroup.com/Alma/Product Documentation/010Alma Online Help \(English\)/030Fulfillment/050Resource Sharing](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/030Fulfillment/050Resource_Sharing)



The screenshot shows a web browser window for the Ex Libris Knowledge Center. The URL in the address bar is [https://knowledge.exlibrisgroup.com/Alma/Product Documentation/010Alma Online Help \(English\)/030Fulfillment/050Resource Sharing](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/030Fulfillment/050Resource_Sharing). The page title is "Resource Sharing". The page content includes a sidebar with "This section includes:" and a list of topics such as "Resource Sharing Workflow", "Managing Resource Sharing Borrowing Requests", and "Managing Resource Sharing Lending Requests". The right side of the page has a "Table of contents" and "No headers" button. The top right of the page has buttons for "More Sites", "System Status", and "Submit a Case". The top right corner of the browser window has a "Alma" button.

Alma Resource Sharing - Documentation

Libguides - <https://exlibris.libguides.com/alma/fulfillment>

Introduction to Resource Sharing



RESOURCE SHARING RELEASE NOTES

- Resource Sharing Models (4 min) 
- Choosing a Resource Sharing Model (4 min) 
- Monitoring Resource Sharing Requests (5 min) 
- Managing Resource Sharing Borrowing Requests 
- Managing Resource Sharing Lending Requests 
- Creating a Lending Request 
- Locating Items for Resource Sharing 
- Receiving and Shipping Resource Sharing Items 

Alma Resource Sharing - Documentation

Workflow profiles -

[https://knowledge.exlibrisgroup.com/Alma/Product Documentation/010Alma Online Help \(English\)/030Fulfillment/080Configuring Fulfillment/090Resource Sharing#Configuring Workflow Profiles](https://knowledge.exlibrisgroup.com/Alma/Product Documentation/010Alma Online Help (English)/030Fulfillment/080Configuring Fulfillment/090Resource Sharing#Configuring Workflow Profiles)

Rota templates -

[https://knowledge.exlibrisgroup.com/Alma/Product Documentation/010Alma Online Help \(English\)/030Fulfillment/050Resource Sharing/020Managing Resource Sharing Borrowing Requests/010Configuring Rota Templates](https://knowledge.exlibrisgroup.com/Alma/Product Documentation/010Alma Online Help (English)/030Fulfillment/050Resource Sharing/020Managing Resource Sharing Borrowing Requests/010Configuring Rota Templates)

Alma Resource Sharing - Documentation

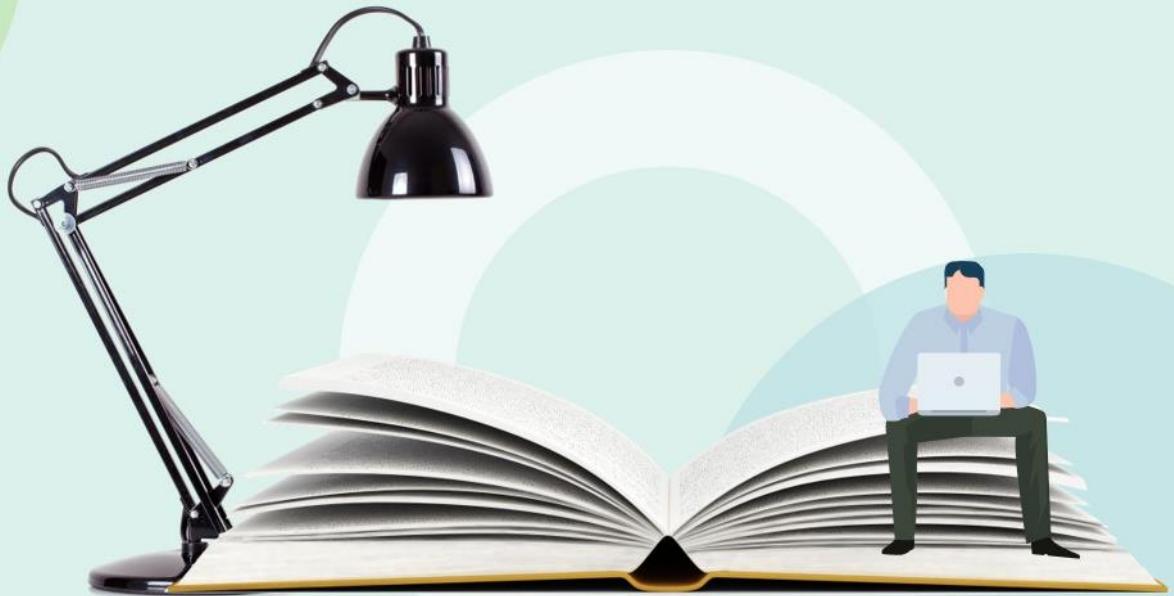
Rota Assignment Rules -

[https://knowledge.exlibrisgroup.com/Alma/Product Documentation/010Alma Online Help \(English\)/030Fulfillment/080Configuring Fulfilment/090Resource Sharing](https://knowledge.exlibrisgroup.com/Alma/Product Documentation/010Alma Online Help (English)/030Fulfillment/080Configuring Fulfilment/090Resource Sharing)

Alma Resource Sharing - Documentation

Alma-Rapid-ILL Integration:

[https://knowledge.exlibrisgroup.com/Alma/Product Documentation/010Alma Online Help \(English\)/030Fulfillment/050Resource Sharing/010Resource Sharing Workflow/RapidILL Based Resource Sharing Workflow](https://knowledge.exlibrisgroup.com/Alma/Product Documentation/010Alma Online Help (English)/030Fulfillment/050Resource Sharing/010Resource Sharing Workflow/RapidILL Based Resource Sharing Workflow)



Alma Resource Sharing – Q&A

Alma Resource Sharing – Q&A





Thank you!

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