



## All You Wanted To Know About Resource Sharing in Alma



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## Overview

“Resource Sharing Requests” is the general Alma term for all forms of inventory sharing among institutions, including sharing formats also known as Inter Library Loan, (Direct) Consortial Borrowing, and Reciprocal Borrowing, all of which involve a patron of one institution receiving fulfillment services from another institution.

Alma’s supports two basic options for resource sharing:

- Via external systems as a direct or mediated service. This includes systems such as WorldCat Navigator, ILLiad and Relais D2D. When applicable, NCIP messages are used in order to automate the integration as much as possible.
- Alma manages all aspects of the resource sharing request-related transactions between the resource sharing partners, and the internal library process that supports the resource sharing lifecycle.

As an implementation of Alma’s standards based design, Alma manages resource sharing communications in a variety of standards, such as (in addition to simple email communication):

- ISO ILL
- British Library ARTEMail
- NCIP

## Resource Sharing Modes

As mentioned above, Alma supports two basic modes of Resource Sharing:

- Via external systems as a direct or mediated service.
  - In this mode, the external system manages the request for its full cycle, at both lender and borrower sides of the lifecycle. Alma will manage the internal library processes that support the ILL workflow. This includes the following:
    - Moving physical items from lender to borrower side;
    - Digitizing material at lender side;
    - Receiving material at the borrower side and placing it on the hold shelf for the patron to collect and loaning out to the patron; and
    - Checking the item back in from the patron, and shipping the item back to the original lending institution.
- Alma manages all aspects of the resource sharing request-related transactions between the resource sharing partners, and the internal library process that support the resource sharing lifecycle.

- In this mode, Alma manages both the resource sharing request-related transactions between the resource sharing partners, and the internal library process that supports the resource sharing lifecycle.
  - Communications with resource sharing systems is based on library standards such as IPIG ISO communications, NCIP messages, BL ARTEMail formats, etc.
  - Searching for potential suppliers is based on Z39.50 metadata and holdings searches.

Alma's resource sharing functions suite, being based on standards, is not affected by whether the participating parties share systems, as long as they are able to use standards for communication. Alma's Integration Profiles platform enables fine tuning of standard protocols usage to match the specific usage that is required by the integrating party. Therefore, any ILS system that supports protocols such as NCIP may integrate with Alma using the standard as tailored via the integration profile.

As mentioned, Resource Sharing can be either mediated, or non-mediated. Another way of describing this is as follows:

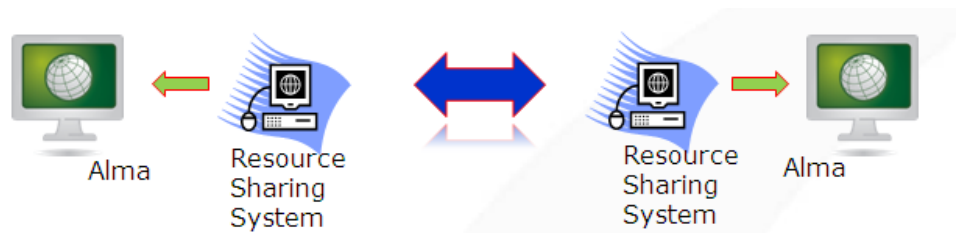
- Loan to institution
  - In this mode, the lending library lends its material to the requester's institution. The loan is managed as classic ILL, with communications and responsibilities being shared between the institutions, and with each institution managing its own patrons internally. The resource sharing communication in this mode is standards based, for example using ISO ILL transactions.
- Loan to requester
  - In this mode the lending library lends directly to an authenticated patron of another institution.
  - Utilizing NCIP messages the lending library may create and manage a temporary patron record, directly managing the borrower as if a patron of its own institution.
  - A link to the temporary patron's affiliated institution is maintained, enabling the resolving of issues also via the patron's home institution.
  - The resource sharing communication in this mode is standards based, for example using NCIP messaging.

## Resource Sharing Options

A number of options allow for different resource sharing 'flavors' in Alma.

## Partial Management of the Request

The diagram below shows how external systems communicate resource sharing requests, while notifying Alma about actions that require supporting library processes. The supporting library processes are managed in Alma.



The processes managed in Alma may include such processes as:

- Fetching the items from shelf
- Moving arrived items to the requested pickup location
- Checking the arrived items out to the requesting patrons
- Checking the items back in from the requesting patron

In this model, Alma integrates with the external systems via NCIP (version 2.0) messages, such as:

- LookupUser
- RequestItem
- CheckOutItem
- CheckInItem
- AcceptItem

External supported systems include:

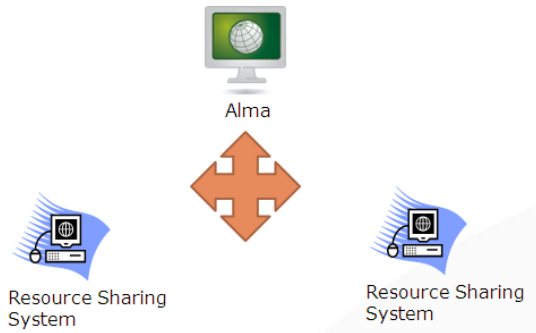
- ILLiad
- Relais D2D
- OCLC Navigator (NRE)

In addition Alma pushes requests into the external systems, based on their integration capabilities. For example, requested metadata is pushed into ILLiad via an OpenURL.

## Full Management of the Request

Not only managing the internal library processes, but also the communications with the non-network partners.

This includes managing the request's potential suppliers and managing the ILL communications protocols, such as ISO communications and others. The diagram below illustrates how Alma directly communicates with resource sharing systems:



## Creating a Resource Sharing Request

Resource Sharing requests may be placed in a number of ways:

Following a search in the Discovery Interface, a list of fulfillment services will be presented for a record, based on an OpenURL that is sent from the discovery interface to Alma. If no local fulfillment options exist, a resource sharing option will be presented. This might be from an external system or for a mediated service to be managed from Alma.

Choosing this option will open a request form that is pre-populated with the discovered metadata. Additional information such as chapter or pages can be added as well as the required format, pickup location not needed after date and more.

(The option for requesting an item from Resource Sharing for an item that exists in the library but is not currently available is dependent on library configurable definitions.)

**Albion**  
 Conference on British Studies. Pacific Northwest Section.; Conference on British...

● **Check holdings**

[Get It](#) [Details](#)

**Alma University**

**Resource Sharing Request:**

**Resource Information:**

Citation type:  Book  Article

Article title:\*

Journal Title:

Author (Last name, first name):

Author initials:

If the desired resource is not found in Alma the patron the patron may submit freely typed in metadata into an OpenURL enabled form (the Primo Citation Linker). In response to the received OpenURL, Alma will reply a services page listing any service that might be available for the requested record. If no local fulfillment options exist, a resource sharing option will be presented.

[Get It](#) [Details](#)

Your search did not match any physical resource in the library  
 Use the link/s below in order to request the resource from other libraries

[Illiad\(1 month\)](#)

[OCLC Navigator\(1 month\)](#)

[Relais D2D](#)

[Resource sharing request](#)

Having problems? Please contact the staff

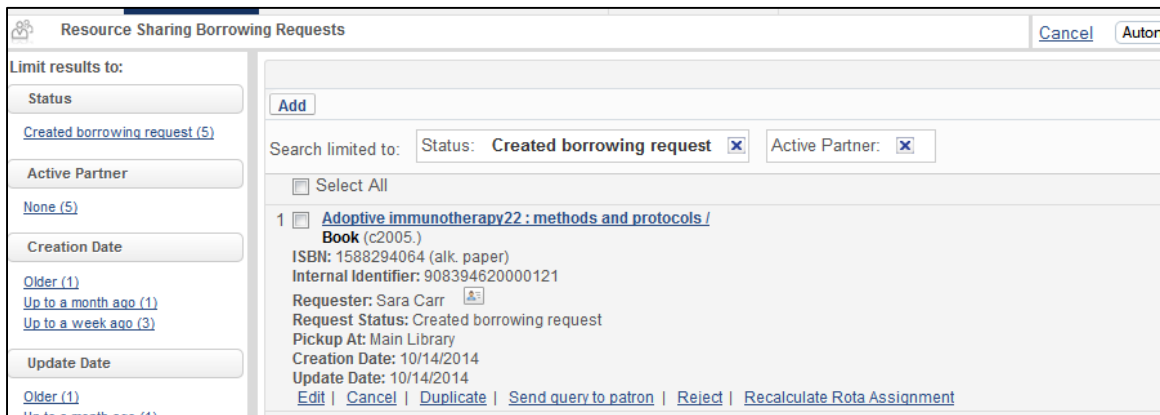
In the case of a mediated request a form will open pre-populated with the discovered metadata as described above:

A blank form may be submitted from Primo. This allows the patron to directly submit a request for freely typed in metadata, without conducting any pre-searching.



Locally created and customized web forms may make use of Alma APIs to directly place a request into Alma.

Additionally, staff may create a request from Alma:



Whichever method is used, the patron will be able to clearly see the Resource Sharing request integrated in the list of items on request from the My Account page in Primo

e-Shelf		Queries	My Account			
Loans (1)	List of Requests					
Requests (4)	#	Type	Title	Author	Status	Pickup Location
Fine & Fees (1)	01	Hold	Aristote.	Piat, Clodius, 1854-1918.	On Hold Shelf	Main Library
Blocks & Messages	02	Hold	Farmageddon	Lymbery, Philip	Created borrowing request	Resource Sharing Library
Personal Settings	03	Hold	The Internet : the rough guide /	Kennedy, Angus J.	Not Started	Main Library
	04	Photocopy	The social system.	Handlin, Oscar, 1915-	In Process	Institutional Digitization Department

## Managing Mediated Borrowing Requests

Staff users responsible for Resource Sharing Request management need to interact with the system to provide the requested resource to the requesting patron. As with other areas of the system, authorized staff can manage borrowing requests using a dedicated task list.

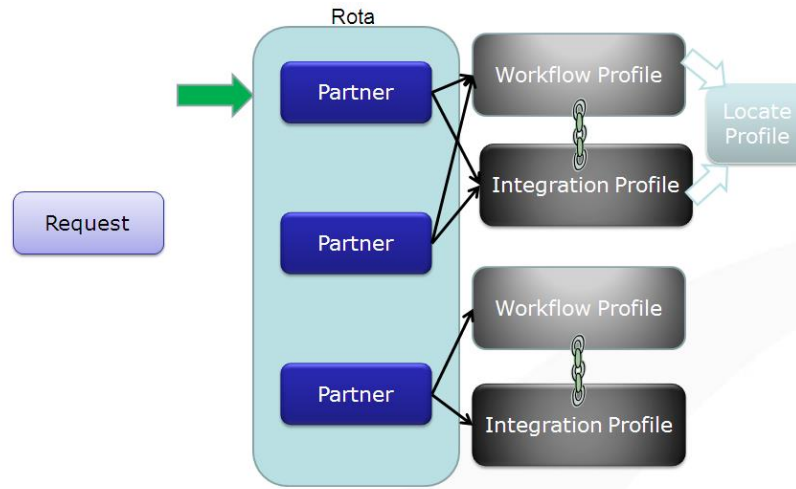
Tasks
<a href="#">Digitization requests - approval (4)</a>
<a href="#">Requests - pickup from shelf (2)</a>
<a href="#">New Lending Requests - assigned to you (1)</a>
<a href="#">New Borrowing Requests with no partner (5)</a>

By clicking on the hypertext link 'New Borrowing Requests with no partner' the staff user will navigate to the Resource Sharing Borrowing Requests list; (alternately the staff user can access the list from the Alma menu.) Requests can be edited – e.g. adding a Resource Sharing partner and other relevant information.

## Resource Sharing Rotas


Managing the potential suppliers for a request is done in three tiers:

- Each institution defines profiles of target institution rotas. Each such rota is an ordered or non-ordered list of potential suppliers.
  - The rota will be used as a list of targets to request from, one at a time.
  - Different rotas may be used for different purposes. For example, an institution may set up a 'quick to respond' rota, an 'expensive but likely to fulfill' rota or an 'e-material experts' rota.
  - Institutional rules as well as manual operations may be used to attach a specific rota to a specific request.
- The suppliers on a rota are checked to see whether they own relevant holdings. Potential suppliers will be contacted only if they appear to own relevant holdings.
- Within a collaborative network, a supplier that is an Alma institution will be ranked lower in the rota if the number of requests from a network partner has exceeded a defined threshold. This way, an overloaded partner will get less new requests directed at it. Calculating an overloaded target is based on Alma being able to collect information from each alliance member with regard to how many requests that institution has open with any target supplier.
- In addition, every Alma network partner can automatically reject new incoming requests based on how many open incoming requests are currently managed at that institution. If the number is past a defined threshold, requests may be automatically turned down.



Manual intervention in the process is possible, allowing staff to manually select a specific supplier if needed.

The request letter to the supplier:

 10/20/2014

## Requested Material

**For general communications use address:** [AlmaUniversityILL\\_communications@exlibrisgroup.com](mailto:AlmaUniversityILL_communications@exlibrisgroup.com)

**For sending articles use address:** [AlmaUniversityILL\\_files@exlibrisgroup.com](mailto:AlmaUniversityILL_files@exlibrisgroup.com)

**Dear Sir/Madam,**

**The following item is requested from your library:**

**Format:** Book  
**Title:** Back from Patagonia  
**Author:** Brown, William  
**Edition:** 2nd  
**Date:** 10/20/2014  
**Request ID:** EXLDEV10001939  
**Request Format:** Physical

At all stages of the request workflow, the staff user and the patron (via My Account in Primo) is able to see the status of the request:

**Add**

Search limited to: Creation Date: **Today**

Select All

1  [Back from Patagonia](#)  
**Book** By Brown, William (2009)  
 External Identifier: EXLDEV10001939  
 Internal Identifier: 913160240000121  
 Partner: National Technical University  
 Requester: John Blacking   
 Request Status: **Request sent to partner**  
 Pickup At: Resource Sharing Library  
 Creation Date: 10/20/2014  
 Update Date: 10/20/2014  
[Edit](#) | [Cancel](#) | [Duplicate](#) | [Send](#) | [Send query to patron](#) | [Receive](#)

#	Type	Title	Author	Status	Pickup Location	Lo
01	Hold	Americanah : a novel /	Adichie, Chimamanda Ngozi, 1977-	Not Started. Place in queue is 1	Main Library	
02	Hold	Horses at work : harnessing power in industrial America /	Greene, Ann Norton, 1952-	On Hold Shelf	Main Library	
03	Hold	Wild Wales.	Borrow, George Henry, 1803-1881.	In Process	Main Library	
04	ILL	Back from Patagonia	Brown, William	<b>Request sent to partner</b>	Resource Sharing Library	
05	Digitization	The consumption of alcoholic beverages.	Fox, Hugh F.	In Process	Institutional Digitization Department	

## Receiving the Item

Once an item is received and loaned to the patron, it is considered as a standard loan by the system. Due date notices will be automatically sent when the item is due, and overdue/lost item notices will be sent as per library policies

When physical items are received in Alma, a temporary bibliographic and item record is created.

1  [Back from Patagonia](#)

**Book** By Brown, William (2009)  
 Library: Resource Sharing Library  
 Availability: [Physical version](#) at **RES\_SHARE: OUT\_RS\_REQ** (1 copy, 0 available)  
[Edit](#) | [Order](#) | [Request](#) | [Document Delivery](#) | [Add to reading list](#) | [Holdings](#) | [Items](#) | [More info](#)

- The bibliographic record is created as a suppressed record and is not published to the discovery interface.
- The item is temporarily owned by the receiving Resource Sharing department. Being an independent unit within the institution, the Resource Sharing library's fulfillment terms of use will apply to the temporary item. The entire fulfillment lifecycle of the item is managed using standard Alma fulfillment procedures, including:
  - Setting up loans and the loans' terms of use
  - Managing the loans, in terms of overdue/courtesy notices
  - Allowing return of the item at all desks, or at designated desks

Creating the temporary item, including assigning of the temporary barcode to the item, may be done manually in Alma at time of receipt, or automatically via the NCIP AcceptItem message.

The item barcode is scanned in. Resource Sharing staff may immediately place it on a hold shelf, or move it to another requested hold shelf, as per the received request's attributes.

Activated	Title	Destination	Barcode	Request/Process Type	Requester
1	Back from Patagonia	On Hold Shelf	RS-EXLDEV10001939	Borrowing Request	John Blacking

[Clear List](#)

An email is sent to the patron notifying him/her that the requested item is waiting for pickup.

## On Hold Shelf Letter

**John Blacking**  
123 Main St.  
Townsville

**Dear Mr./Ms. Blacking**

The following item, which you requested on 10/20/2014, can be picked up at Resource Sharing Library - Resource Sharing Desk Circulation Desk.

The item will be held for you until 10/29/2014.

Back from Patagonia  
By: Brown, William

The item will be loaned to the patron and will be integrated into the patron's list of loans.

	Title	Due Date	Barcode	Fine	Loan Date	Loan Status	Item Policy	Library
1	Back from Patagonia	11/03/2014 17:00	RS-EXLDEV10001939	-	10/20/2014	Normal	Four Week Loan	Resource Sharing Library
2	The first quarto of King Richard III /	12/15/2014 20:00	240.10	-	08/20/2014	Renewed	Three Week Loan	Main Library
3	Il nome della rosa /	12/15/2014 20:00	AU15505	-	08/20/2014	Renewed	One Week Loan	Main Library
4	Archaic Chinese jades: special exhibition, February, 1940.	12/15/2014 20:00	AU16401	-	07/25/2014	Renewed	One Week Loan	Main Library
5	Tohoku Daigaku Nihongo kyōiku kenkyū ronshū.	12/15/2014 20:00	15505.10	-	07/16/2014	Renewed	Four Week Loan	Main Library

## Due Dates

When making a shipment, the lender may specify a due date by which the item is expected to be returned back by the borrower. The due date may be automatically set at shipping time based on predefined rules or manually set by the lender. The due date is automatically communicated to the borrower in the ISO message, and is then automatically used by the system on the borrower side to set the patron's due date.

An additional 'delivery time' offset may be set by the borrower to make sure the patron returns the item in time for the library to ship the item back to the lender before the due date deadline.

Last interest dates may also be set by the patron on the borrower side. These dates will affect the process of expiring the request if the last interest date deadline cannot be met.

## Renewing Resource Sharing Loans

Patrons can directly request extension of a resource sharing request in the same way as they would renew items out on loan in their home library (based, on the option being allowed by the source library).

#	Title	Author	Due Date	Due Hour	Potential Fine	Location	Status
1	<input checked="" type="checkbox"/> Libraries and databases in the modern world	Kortick, Yoel	07/08/2014	17:07		Resource Sharing Library	Renewable

Alternately library staff may request an extension on behalf of a patron.

When the lender replies with a 'renew accepted' message, the new due date is automatically communicated to the borrower via the ISO protocol, and the due date is updated on the borrower side. If the lender rejects the renew request, this is also communicated via the ISO protocol to the borrower.

## Returning the Item

When the patron returns the item a popup message will display indicating to staff that the item needs to be returned to the owning library:

The item's destination is: System - National Technical University  
Request EXLDEV10001939

The record for this item in Resource Sharing indicates that it has been returned to the Resource Sharing partner:

Search limited to: Creation Date: Today [x]

Select All

1  Back from Patagonia  
**Book** By Brown, William (2009)  
External Identifier: EXLDEV10001939  
Internal Identifier: 913160240000121  
Partner: National Technical University  
Requester: John Blacking [i] [a]  
**Request Status: Returned item to partner**  
Pickup At: Resource Sharing Library  
Creation Date: 10/20/2014  
Update Date: 10/20/2014  
[Edit](#) | [Duplicate](#) | [Send](#) | [Send query to patron](#) | [Return](#)

In addition the temporary record created when the item was received is deleted from the repository.

Find All titles where Keywords contains back from patagonia Go

Institution Network Community

Limit results to:  
0 facets available.

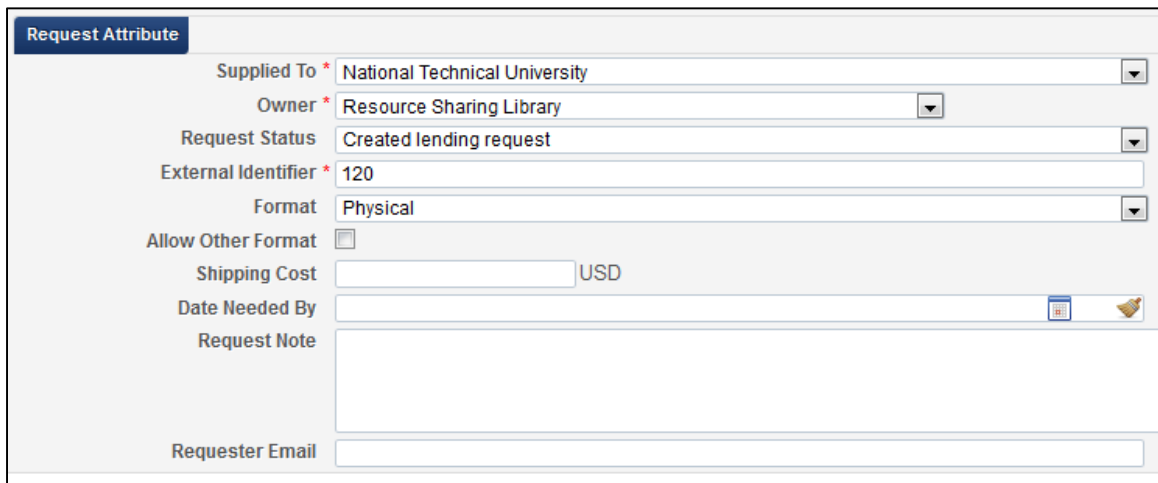
Primary Sort by Rank Secondary Sort by Rank

No records were found.

## Managing Mediated Lending Requests

The lending request process in Alma starts with a registration of the request in Alma – Resource Sharing -> Lending Requests.

The requested item is located, and request attributes are filled in:



**Request Attribute**

Supplied To \* National Technical University

Owner \* Resource Sharing Library

Request Status Created lending request

External Identifier \* 120

Format Physical

Allow Other Format

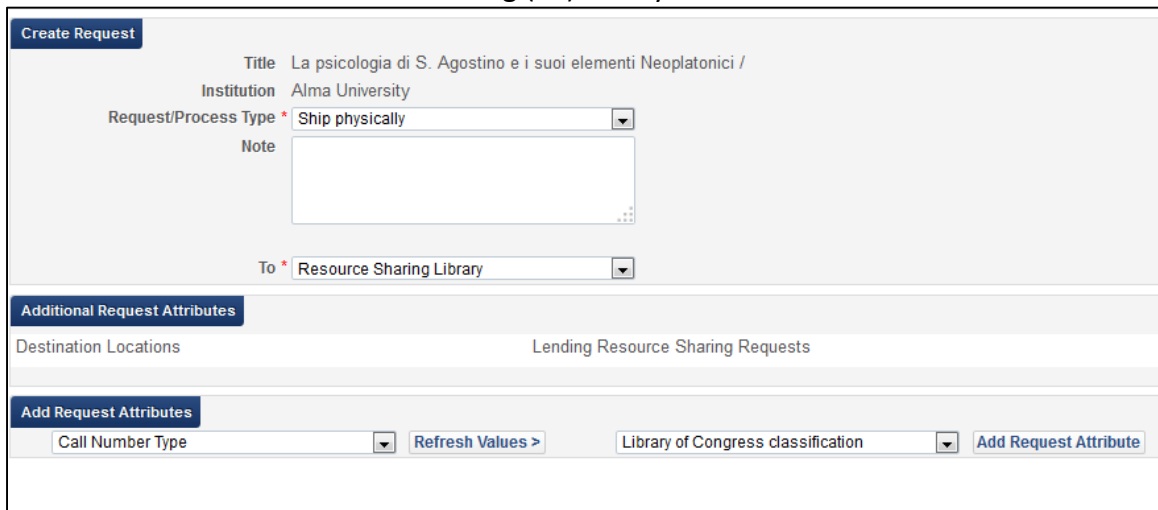
Shipping Cost  USD

Date Needed By

Request Note

Requester Email

Once the request has been saved, staff can then manage fulfillment options – i.e. request that the item be transferred to the Resource Sharing (RS) library.



**Create Request**

Title La psicologia di S. Agostino e i suoi elementi Neoplatonici /

Institution Alma University

Request/Process Type \* Ship physically

Note

To \* Resource Sharing Library

**Additional Request Attributes**

Destination Locations Lending Resource Sharing Requests

**Add Request Attributes**

Call Number Type  Refresh Values > Library of Congress classification  Add Request Attribute

The owning library receives and processes the request, and sends it to the Resource Sharing Library to send to the Resource Sharing Partner.

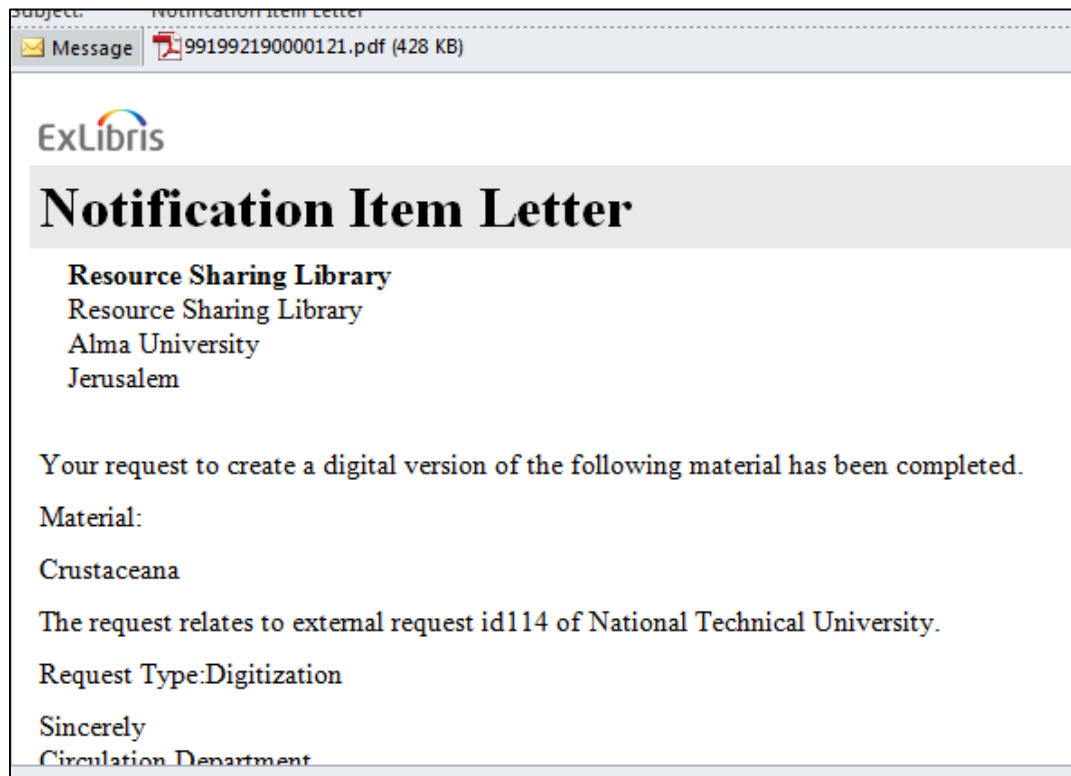
When the item is returned, staff will once again scan in the request ID or the barcode, and the item will then be moved back to the owning library.

## Request for Digital Copy

In the manner described above, a request may be made for an article from a journal. The journal title is found in the Alma repository. Once the request has been created, it can be edited in order to indicate the volume, issue and pages that need to be digitized.



The request is sent to the owning library, the pages are digitized, and sent back to the Resource Sharing library for forwarding to the Resource Sharing partner.



Like any digitization process in Alma, this kind of library driven digitization process may be configured to require copyright clearance. In these cases the digitization process will not be complete until the copyright clearance is signed off.