

## Possible actions for libraries to consider in resource sharing

As the global community continues to monitor the impact of COVID-19, many libraries are taking proactive actions like closing libraries or reducing service hours.

We created this document to help resource sharing librarians Alma in order to answer specific use cases that may arise.

What changes should you consider for Alma resource sharing?

1. General
  - a. [You may want to consider changing eligibility and policies for different users](#)
  - b. [Closing completely for borrowing \ lending](#)
2. Borrowing
  - a. [Set your borrowing request rules to stop any new request for mediation – so it is not sent to any lender without review](#)
  - b. [Prevent borrowing requests for physical items](#)
  - c. [Cancel loan requests that have already been submitted to lenders and not supplied.](#)
  - d. [Send email to all patrons that have a loaned item, asking them not to return the book until libraries are operating again](#)
3. Lending
  - a. [Stop overdue messages from being sent](#)
  - b. [Prevent lending requests for physical items and continue to review and supply copy requests for online articles and other electronic resources](#)
  - c. [Extend due dates for all items on loan](#)
  - d. [Relax any overdue penalties.](#)

## Changing the limits and policies for resource sharing request eligibility

In order to allow patrons to rely more on resource sharing services, you may change the Borrowing Resource Sharing Request terms of use to allow unlimited resource sharing requests, and to remove fees, as shows below.

Policy Type	Policy Name	Policy Description
1 Allow Resource Sharing Requesting	Resource Sharing Allowed	Allow resource sharing requests
2 Resource Sharing Receive Fee	0\$ Policy	-
3 Resource Sharing Request Fee	0\$ Policy	-
4 Renew Fee	No Renewal Fee	Default No Renewal Fee
5 Active resource sharing requests limit	No Resource Sharing Limit	No resource sharing limit
6 Yearly resource sharing requests limit	No Yearly Resource Sharing Requests Limit	No Yearly Resource Sharing Requests Limit
7 Pickup Locations	Anywhere	Default value for Pickup - Anywhere
8 Personal delivery	Personal Delivery - All	Deliver items to a home or an office address
9 Personal delivery fee	Personal Delivery Fee - No Fee	Personal delivery is not charged with a fee

Send Overdue Message to Resource Sharing Borrowing Partner

Status ☒ Active ☐ Inactive

Schedule 

Every day at 02:00

## Closing resource sharing libraries for borrowing/lending

You can stop borrowing requests from being placed at your library by using the 'temporary inactive for borrowing' check mark on the Borrowing Setup section of the Resource Sharing Library. The result will be that the patrons will not have a resource sharing link for placing borrowing requests.

You can stop lending requests from being received at your library by using the 'temporary inactive for lending' check mark on the Lending Setup section of the Resource Sharing Library. The result will be that any lending request that will be received will be automatically rejected.

**BORROWING SETUP**

Cancel request on locate failure

☐

Automatically activate locate profile

☐

Temporary inactive for borrowing

☒

Inactive dates range

Default location

Closed Location Type: Borrowing Resource Sharing Requi

▼

Default pickup location

Theology and Ministry Library

▼

**LENDING SETUP**

Automatically locate resource

☐

Ignore electronic resources

☐

Automatic creation

☐

Temporary inactive for lending

☒

Inactive dates range

Default location

Open Location Type: Lending Resource Sharing Request

▼

## How to prevent borrowing requests for physical items

There are two options to prevent your patrons from placing requests for physical items.

### Option one: using terms of use

You can set the 'Borrowing Resource Sharing' rules in the Resource Sharing Library's Fulfillment Unit, so that it will prevent placing requests for physical items.

Using the below rules makes all requests for physical delivery be considered not allowed.

Resource Sharing Circulating Material

Code RES\_FU

Fulfillment Unit Rules Editor

Name \* Not allow physical

Description

Created By Ex Libris Created On 17/03/2020

Updated By Ex Libris Updated On 17/03/2020

Input Parameters

Name	Operator	Value
1 Request Format	=	Physical

Output Parameters

Terms of Use \* Default terms of use TOU Details Add Terms Of Use

The result of this set up will be that the Primo form will not include an option for a physical request.

### Option two: using configured locate profiles

This option will require two steps:

1. Set the locate profile to ignore physical resource and no ignore electronic

< Locate Profile Details

auto\_Alma

Description	Locate Profile for automation - Alma	Type
-------------	--------------------------------------	------


Locate Profile Details Locate Profile Parameters


Server \* il-urm08.corp.exlibrisgroup.com

Username

Institution \*

Alma Network ☐

Ignore Electronic and Digital Resources ☒ 

Ignore Physical Resources ☐ 

Check item availability ☒

Check item requestability ☒

Allow locate by metadata ☐

Locate by fields ☒

2. In the “Fulfillment Configuration” > “Other Settings” menu, you can set up the **rs\_uresolver\_locate** parameter to true. In that case, Alma’s locate profiles will search the Alma lenders on the rota trying to locate electronic resources using Alma’s link resolver.

514	rs_uresolver_locate	fulfillment	true	Use U-Resolver for E-Locate
-----	---------------------	-------------	------	-----------------------------

This setup option is relevant only for Alma to Alma locate processes and should be done for each partner locate you have

## How to stop overdue notices from being sent

Resource sharing overdue notices are triggered by a job that runs on the lender side. As a lender, you can stop these notices from being sent by deactivating the job. Use the ‘Fulfillment Configuration>Fulfillment Jobs Configuration’ menu to deactivate the ‘Send Overdue Message to Resource Sharing Borrower Partner’ job.

## How to prevent lending requests for physical items

As a lender, you can set Alma so that incoming requests that match against local physical holdings will be automatically rejected.

When setting up the Lending Setup section of the Resource Sharing Library, you can set it up to automatically reject a request that comes in for an item that is not requestable.

### LENDING SETUP

Automatically locate  
resource



Reject request when locate fails



Reject request when no available items



Reject request when no requestable items






Reject request when only electronic available


A simple way to make all of your physical items not requestable is to change the ‘Is requestable for physical resource sharing’ policy, so that it is always false. In other words, changing the definition of the policy that is ‘true’ to false, will change all the otherwise requestable items to


be considered not requestable. This policy can be reverted in one action when you would like to re-instate physical items requesting.

---

 Policy Type **Is Requestable for Physical Resource Sharing**

 Policy Name \*  

Policy Description  


Value \* ☐ True ☒ False 

Default Policy ☒ False ☐ True

You can continue to supply electronic resources. Your resource sharing library configuration controls whether or not you receive requests for electronic resources. If you keep the 'Ignore electronic resources' switch off, Alma will not reject requests for electronic resources.

#### LENDING SETUP

---

- Automatically locate resource ☒
- ☒ Reject request when locate fails
- ☒ Reject request when no available items
- ☐ Reject request when no requestable items
- ☐ Reject request when only electronic available
-  Ignore electronic resources ☐

## Stop New Requests for Mediation

You can set up Alma so that borrower requests will not be automatically sent to the lenders. Rather, all requests will remain in the Borrowing Requests task list with a status of 'Ready to be Sent', and require staff consider the request and send it only if it meets your define criteria.

The Alma tool for this purpose is the 'Sending Borrowing Request Rules' that are configurable from the Fulfillment Configuration > Resource Sharing menu. Setting the default rule to 'false'

will result in all requests not being sent automatically after the locate process is run. If their locate process has succeeded, they will remain in the 'Ready to be sent' status. And can be cancelled or sent manually.

#### < Sending Borrowing Request Rules

Sending Borrowing Request Rules	
Name	Default sending borrowing request rule
Description	Default sending borrowing request rule
Created By	System
Updated By	Ex Libris Staff

Output Parameters	
Send Request	False

You can also set specific rules that will mediate only specific types of requests. For example, you can set the system to require mediation of requests made by specific user types, as shown below.

#### < Sending Borrowing Request Rules

Sending Borrowing Request Rules			
Name *	Mediate Alumin and Undergrads		
Description			
Created By	Ex Libris	Created On	19/03/2020
Updated By	Ex Libris	Updated On	19/03/2020

Input Parameters		
<a href="#">+ Add Parameter</a>		
Name	Operator	Value
1 User Group	In List	Alumni, Undergraduate Student

Output Parameters	
Send Request *	False

## Bulk Cancelling Unreceived Requests

The new March 2020 'Claim Resource Sharing Request' feature enables setting up the system to automatically cancel any borrowing request that has been sent to lender but not shipped or otherwise responded to within a configurable number of days.

You can set up the partner record so that a given number of days after the request has been sent it will be cancelled if not fulfilled, as shown below. If there is another partner in the rota, the request will propagate to that next partner.

The screenshot shows the 'Resource Sharing Partner' configuration page in Alma. The top navigation bar includes 'Acquisitions', 'Resources', 'Fulfillment', 'Admin', and 'Analytics'. The page title is 'Resource Sharing Partner' with a 'Cancel' button. The partner details are as follows:

Partner Code	Profile Type	System Type
OU	ISO	Alma

General Information tabs: General Information, Contact Information, Parameters, Notes.

Fields and values:

- Code: OU
- Name: Open University
- Profile Type: ISO
- Status: Active
- System Type: Alma
- Average Supply Time: 0
- Delivery Delay (days): 0
- Currency: (empty)
- Locate Profile: OU - Open University
- Institution Code: EXLDEM03\_INST
- Holdings Code: (empty)
- Supports Borrowing: ☒
- Borrowing Workflow: Standard Regular Borrowing Workflow
- Supports Lending: ☒
- Lending Workflow: Standard Regular Lending Workflow
- Automatic Claim: ☐
- Automatic Cancel: ☒ (highlighted in red box)
- Time to Cancel (days): 4 (highlighted in red box)
- Cancellation reason: Request expired

## Send Email to All Patrons

There are a number of methods to send notices to all of the patrons that have active loans in Alma.

### Borrower Activity Letter

The Borrower activity letter is sent to any patron that has an active fulfillment service, such as loans, requests or fees with a summary of their current activities. The letter can be customized to include a notice that you would like to send. Use the General Configuration>Letters>Letters Configuration menu option to configure the Borrowing Activity Letter

The below example shows the default letter, with a highlighted insert that will result in a letter such as –



**Dear Elia Zafrani**

**[YOUR LIBRARY NAME] is closed [FROM] - [TO].**

**You can return library materials when the library re-opens.**

**[YOUR LIBRARY NAME] will NOT place blocks on student accounts or charge overdue fines during this time.**

We would like to remind you that you have the following items at your disposal:

Loans

Title	Due Date	Fine	Description
The effort of the French women, by Louis Barthou.	03/04/2020		

Cheers  
Fulfillment Department

**Alma University**

```
<?xml version="1.0" encoding="utf-8"?>
```

```
<xsl:stylesheet version="1.0"
```

```
xmlns:xsl="http://www.w3.org/1999/XSL/Transform">
```

```
<xsl:include href="header.xml" />
```

```
<xsl:include href="senderReceiver.xml" />
```

```
<xsl:include href="mailReason.xml" />
```

```
<xsl:include href="footer.xml" />
```

```
<xsl:include href="style.xml" />
```

```
<xsl:include href="recordTitle.xml" />
```

```
<xsl:template match="/">
```

```
<html>
```

```
<head>
```

```
<xsl:call-template name="generalStyle" />
```

```
</head>
```

```
<body>
```

```
<xsl:attribute name="style">
```

```
<xsl:call-template name="bodyStyleCss" /><!-- style.xml -->
```

```
</xsl:attribute>
```

```
<xsl:call-template name="head" /><!-- header.xml -->
```

```
<xsl:call-template name="senderReceiver" /><!-- SenderReceiver.xml -->
```

```
<br />
```

```
<xsl:call-template name="toWhomIsConcerned" /><!-- mailReason.xml -->
```

```
<div class="messageArea">
```

```

<div class="messageBody">

    <table cellspacing="0" cellpadding="5" border="0">
    <table>
        <center>
            <span style="font-family:Arial; font-weight:bold">
            <FONT COLOR="#FF0000">
                <B>[YOUR LIBRARY NAME] is closed [FROM] - [TO].
            <br/><br/>
                You can return library materials when the library re-opens.
            <br/><br/>
                [YOUR LIBRARY NAME] will NOT place blocks on student accounts or charge overdue fines
            during this time.
            <br/><br/> </B>
            </FONT>
            </span>
        </center>
    </table>

....

    <table>
        <tr><td>@@sincerely@@</td></tr>
        <tr><td>@@department@@</td></tr>
    </table>

</div>
</div>

<!-- footer.xml -->
<xsl:call-template name="lastFooter" />
<xsl:call-template name="myAccount" />
    <xsl:call-template name="contactUs" />
</body>
</html>
</xsl:template>
</xsl:stylesheet>

```

## Customized Letter

It is possible to create a set of users you want to send the message to via an analytics report. For example, a report in the Fulfillment SA such as -

**Selected Columns**

Double click on column names in the Subject Areas pane to add them to the analysis. Or or hovering over the button next to its name.

**Borrower Details**

Primary Identifier First Name Last Name User Group

**Filters**

Add filters to the analysis criteria by clicking on Filter option for the specific column in the selecting its name in the catalog pane.

Loan Status is equal to / is in Active

You can then create a set of users in Alma from that analysis to use with the Update/Notify Users job, see [https://knowledge.exlibrisgroup.com/Alma/Knowledge\\_Articles/Create\\_Users\\_Set\\_for\\_expired\\_patrons\\_based\\_on\\_Analytics](https://knowledge.exlibrisgroup.com/Alma/Knowledge_Articles/Create_Users_Set_for_expired_patrons_based_on_Analytics).

You can also create the set directly from the Analytics report. More information on that can be found in the below links:

- [Analytics - Creating sets in Alma from Alma Analytics Reports.pptx](#).
- [Create a Set in Alma from an Alma Analytics Report](#).

Now, you can customize a letter to be sent to the set of users. This is described in - [https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/050Administration/040Configuring\\_User\\_Management/070Configuring\\_User\\_Notification\\_Types](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/040Configuring_User_Management/070Configuring_User_Notification_Types)

Running the Update/Notify Users job on the created set will send the message to the requires set of patrons, for example –

Run a Job - Enter Task Parameters

Task Parameters: Update/Notify Users

Added/changed field ☒ By user account type ☐ Internal

☐ Set account to ☐ External ☐ Internal

☒ Send notification to user ILL notification

☐ Expiry date

## Extend Due Dates for All Items on Loan

All loans' due dates may be extended so that they will be due only after the library re-opens. This can be done using the Bulk Change Due Dates utility that is available in the Fulfillment>Advanced Tools menu.

### Bulk Change Due Dates

Administrative Change Due Date

Library \*  
logogram & conjunction

Material Type

From Due Date \*  
[calendar icon]

To Due Date \*  
[calendar icon]

New Due Date \*  
[calendar icon]

Change Bulk Due Date

Location  
-

User Group  
Staff

At(HH:MM)

At(HH:MM)

At(HH:MM)

You can run the job for specific libraries and for only those loans that have a due that falls within the time period that the library will be closed. The due date change will trigger a 'Loan Status Notice' to the relevant patrons, with the update about the change in due dates.

## Relax Any Overdue Penalties

Changing the due dates on loans will cause Alma to automatically drop any calculated overdue loans, unless the patrons fail to return the items by the new due dates.

It is also possible to use the Bulk Fine Waiving Utility that is found in the Admin>User Management menu. This utility can be used if you'd like to waive already charged fines. It can be used to waive specific fine types only, and for specific user types only. The utility can be set to waive up to a defined threshold.

### Bulk Fine Waiving

Run Bulk Fine Waiving

Maximum fine threshold to waive \*

User Group \*  
All  
08  
Alumni  
Available For  
Carrel  
Community Borrower  
Contact Vendor  
Developer Network Users

Waiving Reason \*  
Accident

Exclude users with overdue loans ☐

Waive fines types \*  
Resource sharing recieve fee -test  
Resource sharing request fee -test  
Card renewal  
Overdue fine  
All  
Recalled Overdue fine  
Lost item replacement fee  
Renew fee

Waiving comment