

# 44NHSS NHS Education for Scotland – Training Review Session – 27/01/2017

Alma Resource Sharing

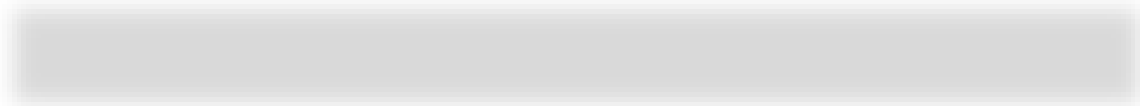
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# Agenda



- **Questions**
- **Workshop issues**
- **BLDSS**
- **Configuration Changes**





# Questions

# Q1: Board Resource Sharing Library

What has to be done to make (at least one) resource sharing library available for each Board/campus, in addition to the institution-wide one?

We need to:

- Assign the library as a Resource Sharing Library in Alma
- Determine which libraries this Resource Sharing Library will deliver items to
- Define a default pickup location – this would normally be this library but it can be a different library if the Resource Sharing Library is never a pickup location
- Ensure that users are assigned the relevant Resource Sharing Library for their campus – Alma will by default manage the request at the out-of-the-box “Resource Sharing Library”

## Q2: User with multiple Res Share Libraries

What happens when a user who is associated with more than one resource sharing library wishes to place a request? Does the user choose which RSL will be asked to deal with the request?

In Primo the patron will be able to choose which of the available Resource Sharing Libraries manages their request.

## Q3: Which Resource Sharing Library

When setting up access for a library staff member to deal with requests at more than one resource sharing library, how do we assign the additional resource sharing library?

When the borrowing request is created, as soon as we fill in the requester's name we will then be offered a choice for Resource Sharing Library (or there may be no choice and we have to use the default)

## Q4: Which policy

What happens if the user belongs to two different resource sharing libraries which have different terms of use/policies? How would the user know which set of conditions applied (e.g. length of loan, fines policy, pick-up options)?

As soon as the request is created and the specified resource sharing library applied, Alma will then know which policy to use for the loan of ILL items. Note that this policy can be library-specific – e.g. Ayr and Arran's resource sharing library could be using a different policy from Lanarkshire.

## Q5: Receiving borrowing request items

To receive a requested item, must the fulfilment operator be 'at' the desired pick-up location and/or have a role at that circulation desk?

To receive borrowing request items we must be currently at the library managing the Resource Sharing request.

You will need one of the following roles with the scope of the Resource Sharing Library you are receiving items at:

- Fulfillment Services Manager
- Fulfillment Services Operator



## Q6: Returning an item

When an item is returned, is its status automatically changed to 'at resource sharing library' or must it be scanned in there to show at being there ready for shipment?

When the item is scanned back in to the Resource Sharing Library then Alma will accept that this is the end of the request process and the item can be shipped back to the partner. There isn't an intermediate stage for the item being back at the RS Library but not yet put back in the post (it is possible to configure Alma so that the request sits in a stage of "Item returned by patron" and waits for us to manually complete the request).

## Q7: NCIP Functions

Is LookUpUser function only available when broker is being used for Resource sharing, or could it be made available for external use via API? Can AcceptItem and CheckIn Item be used by external systems that are not resource sharing brokers?

Alma would expect NCIP communications to be coming from a Resource Sharing Broker.

## Q8: Lending Request – Role Required.

Can a lending request be typed in by a staff member who does not have a role at the Resource Sharing Library? If not, what roles are required?

To create a Lending Request you do not need to be currently at a Resource Sharing library – it can be done whilst logged in anywhere.

The role required is “Fulfillment Services Manager/Operator” at the Resource Sharing library.

## Q9: Return of loaned item

Can an item that has been lent externally be returned via a third party system that is not a broker e.g. via API?

The item could be scanned into Alma via an API (“Scan-in Operation on Item”) or via a self-check machine, it would not necessarily have to be returned via the Alma User Interface.

## Q10: Move Requests

Who can make a move request?

The “request” link that we see from repository search is an all-or-nothing switch – i.e. if we can place a request, it can be for a Physical Item, Move Temp/Permanent, Booking etc.

The role of “Fulfillment Services Operator” is required to create the request. There isn’t a role specific to “Move Requests”.

# Q11: Lending Requests – Which copy

Can operator choose which location to send a lending request to (where copies are available in different libraries)?

When managing the lending request we get to choose which location we will select a copy from – see below, we can click on “Actions”->”Request” to request a copy from a specific location.

Physical Services						1 - 3 of 3 Records	Columns	Tools
Library	Location	Call Number	No. of Items	Available	Actions			
1 NHS 24 West	Main Lending	WF148 FRA	2	2	Actions			
2 NHS 24 East	Main Lending	WF148 FRA	1	1	Actions			
3 St John's Hospital	Main Lending	WF 140 WY FRA	1	0	Actions			

## Q12: Citation Linker

Can citation linker be configured to appear only to some user groups? How is this done?

Since the Citation Linker can be used for both finding resources and placing requests it can't be assigned to a specific user group.

# Q13: Resource Sharing Request Limits

What are the options for imposing a limit on resources sharing requests and how is this done? Can a concurrent limit be set independent of an overall limit?

The Resource Sharing Requests limit is defined by the Borrowing Resource Sharing policy.

You are configuring: Resource Sharing Library

## Please Confirm Terms of Use Setup

Terms Of Use 4 Week Staff

Allow Resource Sharing Requesting	Resource Sharing Allowed	Allow resource sharing requests
Resource Sharing Receive Fee	No Resource Sharing Fee	No fee for resource sharing requests
Resource Sharing Request Fee	No Resource Sharing Request Fee	No request fee for resource sharing request
Renew Fee	No Renew Fee	No Renew Fee
Resource Sharing Requests Limit	25 Resource Sharing Requests Limit	25 Resource Sharing Requests Limit
Pickup Locations	Pickup only in owning library	Must pickup in owning library
Personal delivery	Personal Delivery - None	Do not deliver items at all
Personal delivery fee	No Personal delivery fee	No Personal delivery fee

The limit is for concurrent requests. There is a development on the Alma Road Map for limits within a time period. Thus there will be:

- Active req limit
- Per year limit



## Q14: Partner Time Limits

Partners appear in the video with a time limit in brackets. Is this supply lag, standard loan period or what? Can it be suppressed even if the information is added to partner record?

This the supply lag for an item – it's not automatically calculated and it's not of functional value (so it can be left blank). It tells us that a partner typically takes "X" days to supply an item.

## Q15: Temporary Item Barcodes

Temporary item barcodes seem to be generated automatically. Can this be optional, or an alternative item barcode used/reused?

There is a setting in “Fulfillment Configuration” (Alma Menu -> Fulfillment -> Fulfillment Configuration -> Configuration Menu -> General -> Other Settings) that causes the automatic generation of the barcode:

`generate_resource_sharing_temp_barcode` – This is currently set to “true” – the barcode is based on the “External Identifier” in the request.

Note that the temporary barcode could be re-used – we can use the same code over and over, but we can’t have 2 items using it at the same time.

## Q16: Issues by title

Can an item obtained by resource sharing be issued by title as owned items can?

Yes – we can find these by title as they will be located in the inventory.

## Q17: Copyright terms

What function does the checkbox for 'copyright terms' have? Does it appear on partial copying/digitisation requests only?

The checkbox indicates to staff that the patron has agreed to copyright terms – it's not of functional value.

It will appear on all borrowing requests – it can be mandatory if required (in Alma and/or Primo).



# Workshop Issues

# Average Supply Time / Delivery Delay

During the Workshop we saw the parameters in the partner for “Average Supply Time” and “Delivery Delay”

## Average Supply Time

- This is an information parameter so doesn't have functional value – i.e. Alma doesn't use it as part of the Borrowing Request, we receive the item when we receive the item
- We can indicate here that this partner typically takes “X” days to supply an item (i.e. how long it takes to get to us)

## Delivery Delay

- How long would it take us to get the item back to the partner.
- When we assign a Borrowing Request Due Date (i.e. when they want it back), Alma uses this, together with the Delivery Delay and the loan policy to determine when the Patron Due Date will be.

# Delivery Delay Example

Delivery Delay = 5 days

Loan Date: 23/01/2017

Borrowing Request Due Date: 17/02/2017

Patron Due Date: 13/02/2017

- This is the Borrowing Request Due Date 17/02
- Take away 5 days for the Delivery Delay – 12/02
- This is a Sunday and we have defined the “Resource Sharing Library” as being closed then
- The loan policy suggests the date is moved to the end of the next working day so the resulting due date is 13/02 (Monday). If we updated the policy to move the due date to the closing time before the due date then it would be 10/02 (Friday).

# Mediated Patron Renewal

During the Workshop we looked at an example where we borrow an item from an external partner and then the patron wishes to renew it.

The workflow depends on “Mediated Patron Renewal” being listed in the Workflow Profile. We can see below the profile that is being used “Borrowing All”:

Automatic renew, Cancel request not accepted, Cancelled By Patron, Cancelled by partner, Cancelled by staff, Declared lost by partner, Externally Obtained, Lender check in, Manual renew, Mediated Patron Renewal, Recalled by partner, Reject, Renew requested, Report damaged item to partner, Report lost item to partner, Request accepted, Waiting for cancel response, Waiting for receive digitally, Will Supply	<b>Actions</b>  <b>Mediated Patron Renewal listed</b>
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The presence of this option means that when the patron asks for renewal library staff are involved in the communication to the partner. If this option isn't included then the renewal request goes direct to the partner.



# Mediated Patron Renewal Enabled – Steps in Workflow

- Borrowing request is created, item is received from partner and issued to our patron
- Via Primo or Patron Services the renew is requested – the patron is informed that library staff are looking into this.
- In Borrowing Requests we “Request Renew” – this sends Email to partner asking for renewal to specified date
- We receive confirmation/rejection Email from the partner (this isn't in Alma) telling us that the item can or cannot be renewed.
- If appropriate we then click on “Renew” on the Borrowing Request – the new date is assigned and Alma calculates the new due date for the patron

# Mediated Patron Renewal Enabled – Steps in Workflow

Example (Partner has Delivery Delay of 5 days):

- Borrowing request created
- Item received and due date (for Borrowing Request) is set to Friday 17<sup>th</sup> Feb 2017
- Issued to patron – due date (for patron to return) is Monday 13<sup>th</sup> Feb 2017 – this is because the delivery delay for the partner is subtracted from the date it's due to be returned to them. In this case this would result in Sunday 12<sup>th</sup> Feb 2017 – the policy for the loan of the item defines what happens here and is currently “Move to End of Next Open Day”
- Renew via Patron Services screen
- Request Renew via Borrowing Requests (new due date of Friday 3<sup>rd</sup> March) – goes to partner
- We update the Borrowing Request with the partner's response (Yes) – Alma updates the due date for the patron (now Monday 27<sup>th</sup> Feb 2017) and sends them a notification

# Mediated Patron Renewal Disabled – Steps in Workflow

- Borrowing request is created, item is received from partner and issued to our patron
- Via Primo or Patron Services the renew is requested
- Alma Emails the partner requesting a renewal – this is using the loan policy that will be used when the item is issued to the patron. Note that renewal will not be possible if the loan period defined by the policy doesn't extend the due date provided for the item. For example if the loan period for the policy is 4 weeks then this will be the suggested renewal period based on the current date.
- Partner Emails library (outside of Alma) confirming/denying the request
- We renew the request due date via the Borrowing Request screen and Alma calculates the new due date for the patron

# Mediated Patron Renewal Disabled – Steps in Workflow

Example (Partner has Delivery Delay of 5 days):

- Borrowing request created
- Item received and due date (for Borrowing Request) is set to Friday 17<sup>th</sup> Feb 2017
- Issued to patron – due date (for patron to return) is Monday 13<sup>th</sup> Feb 2017 – this is because the delivery delay for the partner is subtracted from the date it's due to be returned to them. In this case this would result in Sunday 12<sup>th</sup> Feb 2017 – the policy for the loan of the item defines what happens here and is currently “Move to End of Next Open Day”
- Renew via Patron Services screen – the renewal is sent directly to the partner using the suggested renewal period based on Today + Loan Period for the policy
- Partner responds and we update the Borrowing Request : the due date for the patron is updated by Alma and a notification sent to the patron

# Mediated Patron Renewal

## Enabled:

- Request of renewal is manual – i.e. we send the renewal request from the Borrowing Requests screen and so we suggest the required due date to the partner
- When the patron requests the renewal the Borrowing Request is assigned the status “Mediated Patron Renewal” but nothing is flagged up for staff. We could provide a daily analytics report (Mediated Patron Renewal requests from the previous day) or staff would have to be visually checking the “Borrowing Requests” and clicking on the facet for “Mediated Patron Renewal”.

## Disabled:

- Request of renewal is automatic – i.e. the first we know about it is when we get an Email back from the partner confirming/denying the renewal request. Alma suggests the required due date to the partner



**BLDSS**



# BLDSS Setting Up

## Step #1 – Library registers for British Library account

You already have these accounts.

BL NES Library Privilege 88-3606

BL NES CLA License 88-3132

BL NES 88-1301

Support have registered these via the SF case 374543

# BLDSS Setting Up

Step #2 – Confirm the accounts with the BL

Log in to application management: <https://api.bldss.bl.uk/applications/>

API Client applications your Business Unit(s) are registered to use

Application Name	Business unit Name	Business unit Key	Status
My API Application	BLDSS TEST Chicago Pharmaceuticals	51-0083	CREATED



# BLDSS Setting Up

## Step #3 – Alma Partner

Partner Code: BLDSSTEST Partner Name: BLDSS Test Partner

General Information Contact Information Parameters

**Partner Information**

Code *	<input type="text" value="BLDSSTEST"/>	Name *	<input type="text" value="BLDSS Test Partner"/>
Profile Type *	<input type="text" value="BLDSS"/>	Status	<input type="text" value="Active"/>
System Type *	<input type="text" value="BL DSS"/>	Delivery Delay (days)	<input type="text" value="0"/>
Average Supply Time	<input type="text" value="0"/>	Borrowing Workflow	<input type="text"/>
Currency	<input type="text"/>	Lending Workflow	<input type="text"/>
Supports Borrowing	<input checked="" type="checkbox"/>		
Supports Lending	<input checked="" type="checkbox"/>		
Locate Profile	<input type="text" value="BLDSS"/>		

Partner Code: BLDSSTEST Partner Name: BLDSS Test Partner

General Information Contact Information Parameters

General Information

Base URL	<input type="text" value="http://api.blcss.bl.uk"/>
Account *	<input type="text"/>
Password *	<input type="text"/>
Digital format	<input type="radio"/> Encrypted Download <input type="radio"/> Unencrypted download <input type="radio"/> Secure File Transfer
Send Requester Information	<input type="checkbox"/>

# BLDSS Setting Up

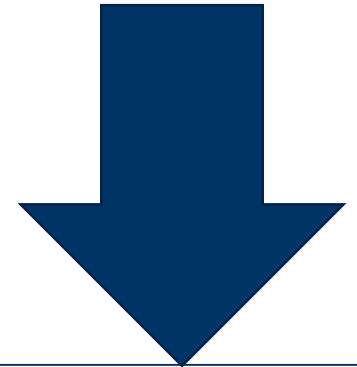
## Step #4 – Additional changes

Change	Note
Add partner to rota templates	Optional
Use rota assignment rules to automatically add BLDSS to new requests	Optional
Configure resource sharing library to automatically trigger a locate request	if we use a specific Resource Sharing Library with this then the locate request is sent automatically
Have the Sending Borrowing Request Rules so that new requests are sent to the BLDSS	once a request is created using a given partner/user groups then it's sent automatically

# BLDSS Setting Up – Rota Templates

We can create a rota of potential partners – the rota can be ordered or non-ordered (i.e. Alma will select a partner randomly from the list)

We can then use the rota in a Borrowing Request



**Template Members**

General Information | **Template Members** | Notes

Code TESTROTA

**Template Members**

Partner  Place At/Before First

		Move Up	Move Down	Name	Code
1	<input type="checkbox"/>		▼	Workshop Test	WORKSHOP
2	<input type="checkbox"/>	▲		Stephen's Partner	STEPHB

First

**Rota**

Cancel | Cancel Request |

General Information | Audit | **Rota** | Parameters | General Messages | Notes | Received Items | Attachments

**Partners**

Partner  Place At/Before First

Columns

		Move Up	Move Down	Name	Code	Profile Type	Status	
1	<input type="checkbox"/>			Workshop Test	WORKSHOP	Email	Active	<input type="button" value="Actions"/>
2	<input type="checkbox"/>	▲		Stephen's Partner	STEPHB	Email	Pending	<input type="button" value="Remove"/>

# BLDSS Setting Up – Rota Assignment Rules


Rota assignment rules can be used to automatically add a BLDSS partner to a new request

Alma Menu -> Fulfillment Configuration -> Configuration Menu -> Resource Sharing -> Rota Assignment Rules

## Criteria:

- Level of Service - Assigned when the request requires one of the selected levels of service
- Price - Assigned when the request's price is greater than, equal to, or less than the specified price
- Requested Format - Assigned when the request requires one of the specified request types
- Required in Number of Days - Assigned when the requested duration is greater than, equal to, or less than the specified number of days
- User Group - Assigned when the user making the request is in one of the specified user groups

# BLDSS Setting Up – Rota Assignment Rules

 Rota Assignment Rules Ca

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**Rota Assignment Rules**

Name \*

Description

Created By Ex Libris Created On 26/01/2017

Updated By Ex Libris Updated On 26/01/2017

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**Input Parameters**

No records were found.

Name	Operator	Value
<input type="text"/>	<input type="text"/>	<input type="text"/>

[Possible Value>](#) [Add Parameter](#)

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**Output Parameters**

Name	Result
Rota Templates	* <input type="text"/>

# BLDSS Setting Up – Auto-trigger locate

We configure this for the Resource Sharing Library – in the example below, every Borrowing Request created at Ayr would trigger the locate profile (if there was one)

Organization Unit Name Ayr Hospital      Organization Unit Type Library      Path 44NHSS.44NHSS\_INST.AAYR

Summary    Contact Information    Calendar Management    IP Definitions

### General Details

Organization unit name \* Ayr Hospital  
Code AAYR  
Path 44NHSS.44NHSS\_INST.AAYR  
Base Url -  
Description  
Default location for acquisition Main Lending      Campus Ayrshire & Arran  
Proxy

### Resource Sharing Information

Is resource sharing library   
Itemless   
Symbol  
Borrowing Setup  
Cancel request on locate failure   
**Automatically activate locate profile**   
Default location Resource Sharing  
Default pickup location Ayr Hospital

# BLDSS Setting Up – Automatically Send to BLDSS

Sending Borrowing Request Rules (Alma Menu -> Fulfillment -> Fulfillment Configuration -> Configuration Menu -> Resource Sharing -> Sending Borrowing Request Rules)

### Sending Borrowing Request Rules

Name \* Example Rule  
Description  
Created By Ex Libris Created On 27/01/2017  
Updated By Ex Libris Updated On 27/01/2017

#### Input Parameters

Name	Operator	Value	
1 Partner	=	BL NES	Delete

Name: User Group Operator: InList Value: Possible Value>

Select All

- Administrative
- EBIRT student
- External
- HIR client
- HP leaflets and posters client
- HP tutor
- HS internal staff
- ILL library
- NHS staff
- Non-NHS staff
- SCLD members
- Borrowing library
- ENABLE staff
- General public
- HML client
- HP student
- HS external client
- Health centre staff
- Library staff
- Non-NES staff
- Research borrower
- Student

Add Parameter

#### Output Parameters

Name: Send Request Result: \* True

Cancel Save



# Configuration Changes





# Workflow Profile

The “Workflow Profiles” determine the steps available – as we see from “Mediated Patron Renewal” this changes how we manage the Resource Sharing Requests

We currently have 2 profiles but we can customize these or add others. For example, we can have a profile that is specific to particular partners.

Workflow Profile	Type	Steps
Borrowing All	Borrowing	Automatic renew, Cancel request not accepted, Cancelled By Patron, Cancelled by partner, Cancelled by staff, Declared lost by partner, Externally Obtained, Lender check in, Manual renew, Mediated Patron Renewal, Recalled by partner, Reject, Renew requested, Report damaged item to partner, Report lost item to partner, Request accepted, Waiting for cancel response, Waiting for receive digitally, Will Supply
Lending All	Lending	Cancel reply, Patron renewal, Renewal response, Staff renewal

# Applied Loan Policy for ILL/Res Share Items

A policy is applied to the loan of the temporary item when it's in Alma.

Here we can define the policy (it can be local to the Resource Sharing library) that will tell Alma how the loan is to be handled. For example:

- if the policy does not permit renewal then the patron could not ask for renewal regardless of the partner or workflow profile
- The “Closed Library Due Data Management” would determine what happens when the due date falls on a closed day. We currently have this as moving to the end of the next day but given the Delivery Delay it probably makes more sense to shorten the date to the upcoming closing time prior to the due date.

# Resource Sharing Libraries – Which?

We define in Alma which libraries are to be Resource Sharing Libraries

The suggestion from the Workshop was that these would be assigned on a per-board/campus basis.

For each Library that is the resource sharing library for a campus (e.g. Ayr Hospital):

- Loan policy – do we have a library-specific policy or do we wish to use one single policy for ILL loaning of items within Alma?
- Relationships – which libraries does it deliver ILL items to?

# Resource Sharing – Questions?





**THANK YOU**

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