



Minneapolis

ILLiad and Alma - Together At Last

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ILLiad Integration



KEY TOPICS

1

**Integration
Options -
Current**

What have we
been doing until
today ?

2

**Integration
Options -
New**

What can we do
from today on ?

3

4

5

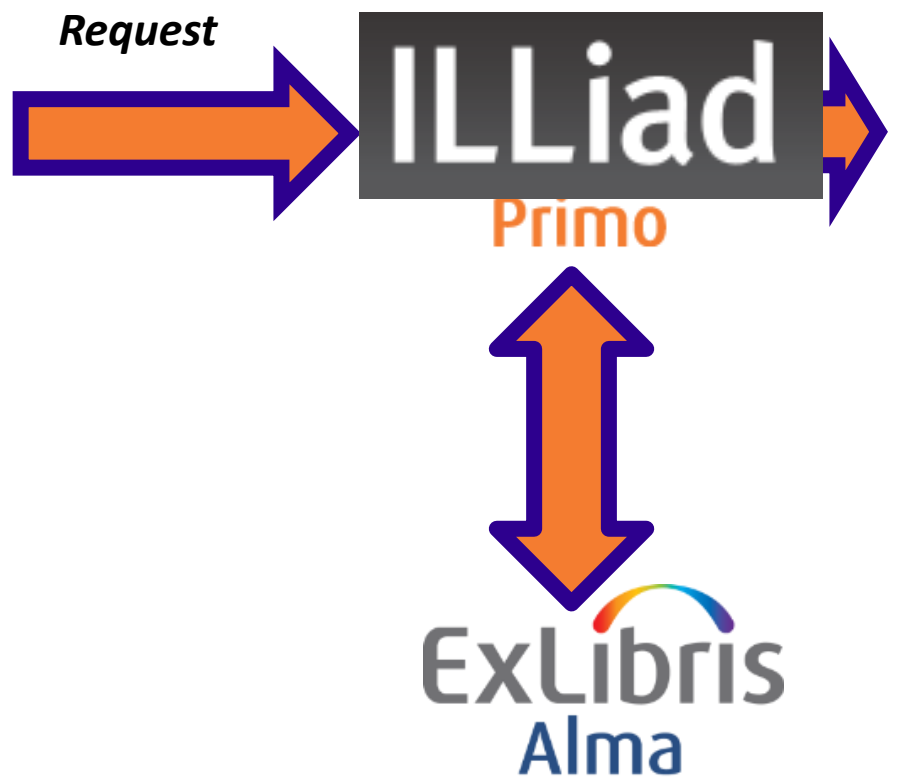




Previously Existing Integration Options

Direct Requesting in ILLiad

Workflow & Integrations – Place Request



Workflow & Integrations – Place Request

1 Results for All Library Resources

Sorted by: Releva



Book

African renaissance and Afro-Arab spring : a season of rebirth?

Charles Villa-Vicencio; Erik Doxtader; Ebrahim Moosa ; 2015

● **Not on Shelf at** Library Stacks (DT30.5 .A36567 2015)

[Save/Email](#)

[Find in Library](#) [More Information](#) [Virtual Browse](#)

Boston University

[Save/Email](#) 

Request Options:

[Request](#)

[Get it from another library](#)



Location: Stacks DT30.5 .A36567 2015

[Hide Details](#)

Availability: (1 copy, 0 available)

1 - 1 of 1 Records

Type	Policy	Description	Status
Book	28 Days		On order

Direct Request of ILLiad in Alma – (Partner)

Resource Sharing Partner

Partner Code: ILLIAD

General Information Contact Information Parameters Notes

General Information

User identifier type * UserID

Request pushing method * Open URL Link

URL template ←

Add user auto login to URL No Yes

Enable service for guest user No Yes

Disable service when Never

When resource is owned by the campus

When resource is owned by the campus and available

When resource is owned by the institution

When resource is owned by the institution and available

Loan period

Default library owner * Resource Sharing Library

Request Item

Bibliographic record ID type * OCLC Number

Check-Out Item

Default location * Borrowing Resource Sharing Requ

Default item policy * 1 Week Loan

Accept Item

Default location * Borrowing Resource Sharing Requ


Default pickup library O'Neill

Automatic receive

Look Up User

Require Authentication No Yes

Direct Request of ILLiad in Alma – (GES)

 **Service Details**

Service Code IliadBook
Service Name Iliad Requests
Service Description Sends openurl request to the ILLIAD form

Service Details | **Service Availability Rules**

Active

Service Code * IliadBook

Service Name *

Service Description

Public Name

Public Note

Display Location *

URL Template *

Enable without login No Yes

Disable service Never
 When resource is owned by the campus
 When resource is owned by the campus and available
 When resource is owned by the institution
 When resource is owned by the institution and available



Previously Existing Integration Options

ILLiad as a Rota Member

ILLiad in Rota – As Partner (Option 1)

P2P Partner 1



P2P Partner 2

P2P Partner 3

P2P Partner 4

ILLiad



ILLiad in Rota – As Partner (Option 2)

Request Cancellation

[REDACTED]

[REDACTED]

[REDACTED] 54

On 02/16/2015 we canceled your request of 02/16/2015 detailed below:

The cult of votive tablets in Thailand, sixth to thirteenth centuries /

By: Chirapravati, M.L. Pattaratorn.

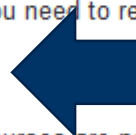
Reason for cancellation: Failed to locate potential suppliers



Please, contact us if you have questions.

If you still need this item, or you need to request other items, please submit an Interlibrary Loan request form:

[Request from Interlibrary Loan](#)



Note that books required for courses are not obtainable through Interlibrary Loan.

Circulation Desk, 1st Floor

1875 SW Park Avenue

[Contact Us My Account](#)

And then ?



ExLibris
Alma

ILLiad

ELUNA 2014 ...

Managing ILLiad Transitions in Aleph via NCIP

Interoperability

Location: Bersimis

Hank Sway (Harvard University); Bill Jones (SUNY Geneseo)

Focus: Aleph

Harvard University and the IDS Project have collaborated to develop an ILLiad add-on that transmits interlibrary loan transactional data to Aleph, using the NCIP protocol, for processing and management. This approach streamlines many staff fulfillment workflows; offers improved tracking of materials; and delivers a number of user-centric improvements, such as the ability to view both interlibrary loans and "regular" loans in Aleph's My Account. This presentation will cover the add-on's functionality in detail, and describe how your institution can take advantage of the open source software.



New Integration Options

The Broker Model - Concept

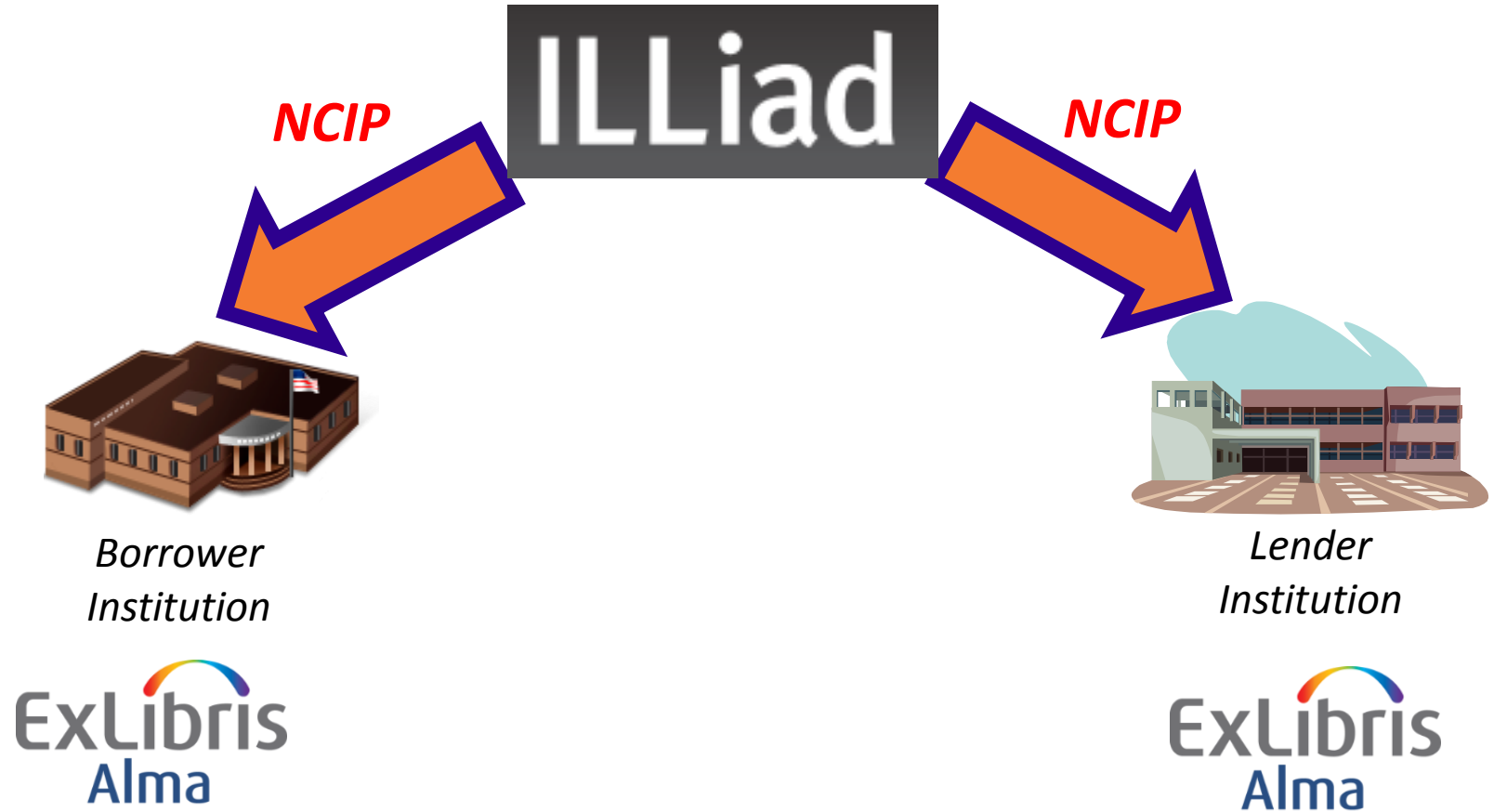
ExLibris
Alma



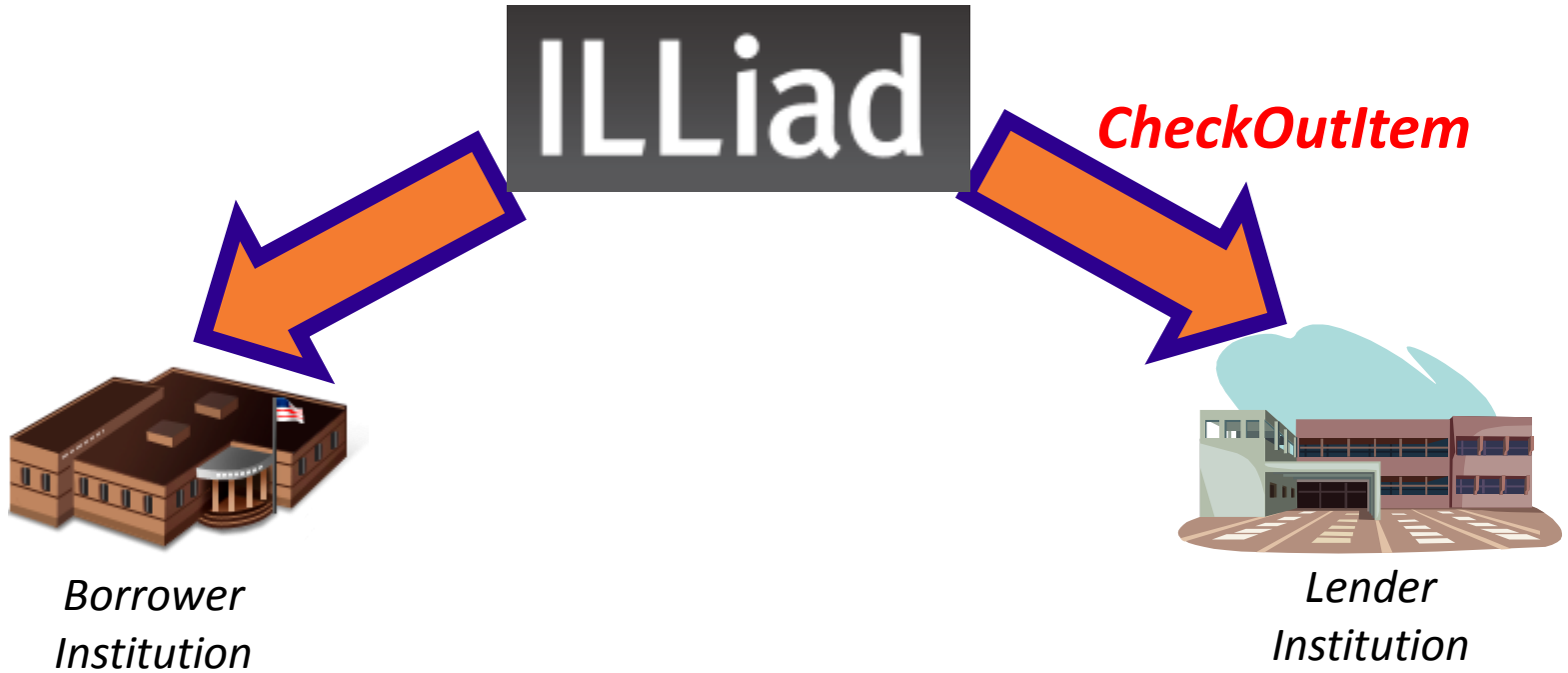
ILLiad



Workflow & Integrations – Borrow & Lend



Workflow & Integrations – Borrow & Lend



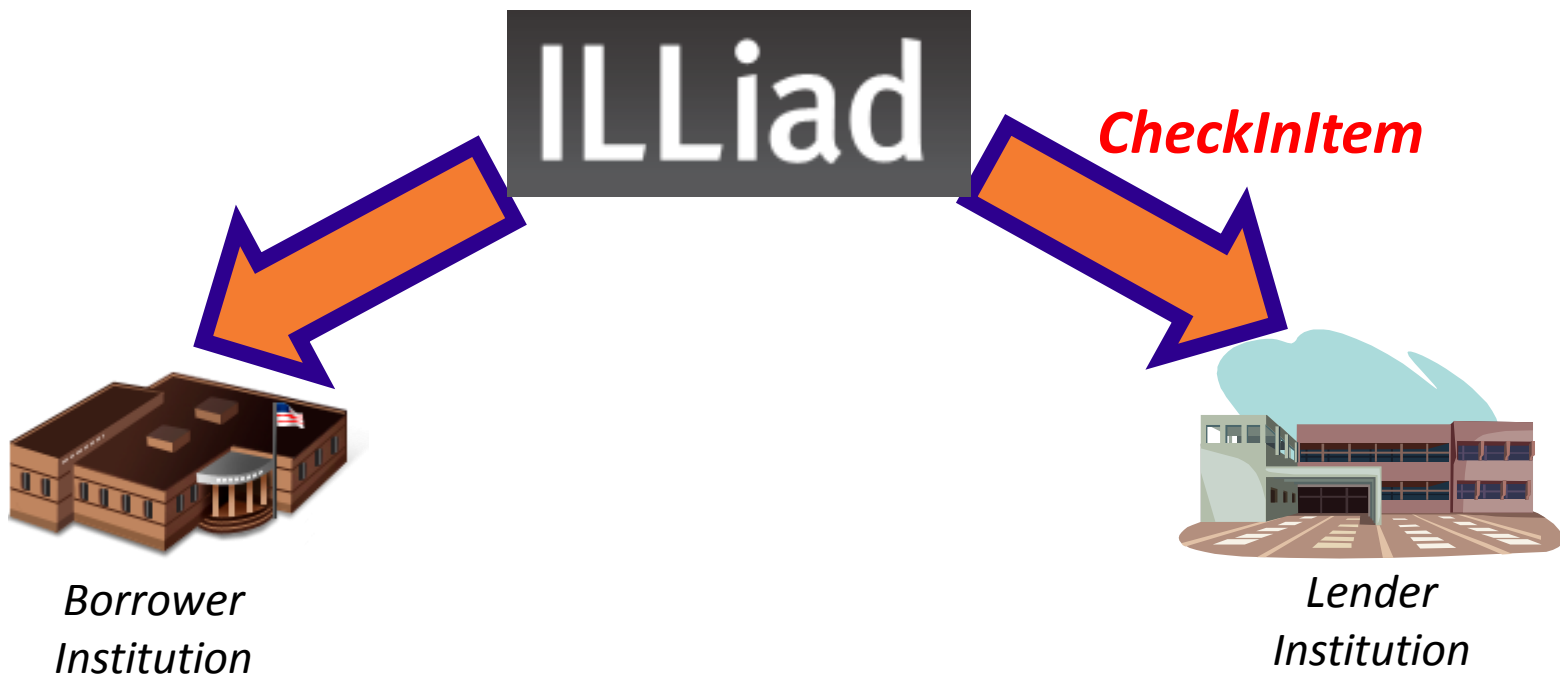
Workflow & Integrations – Borrow & Lend

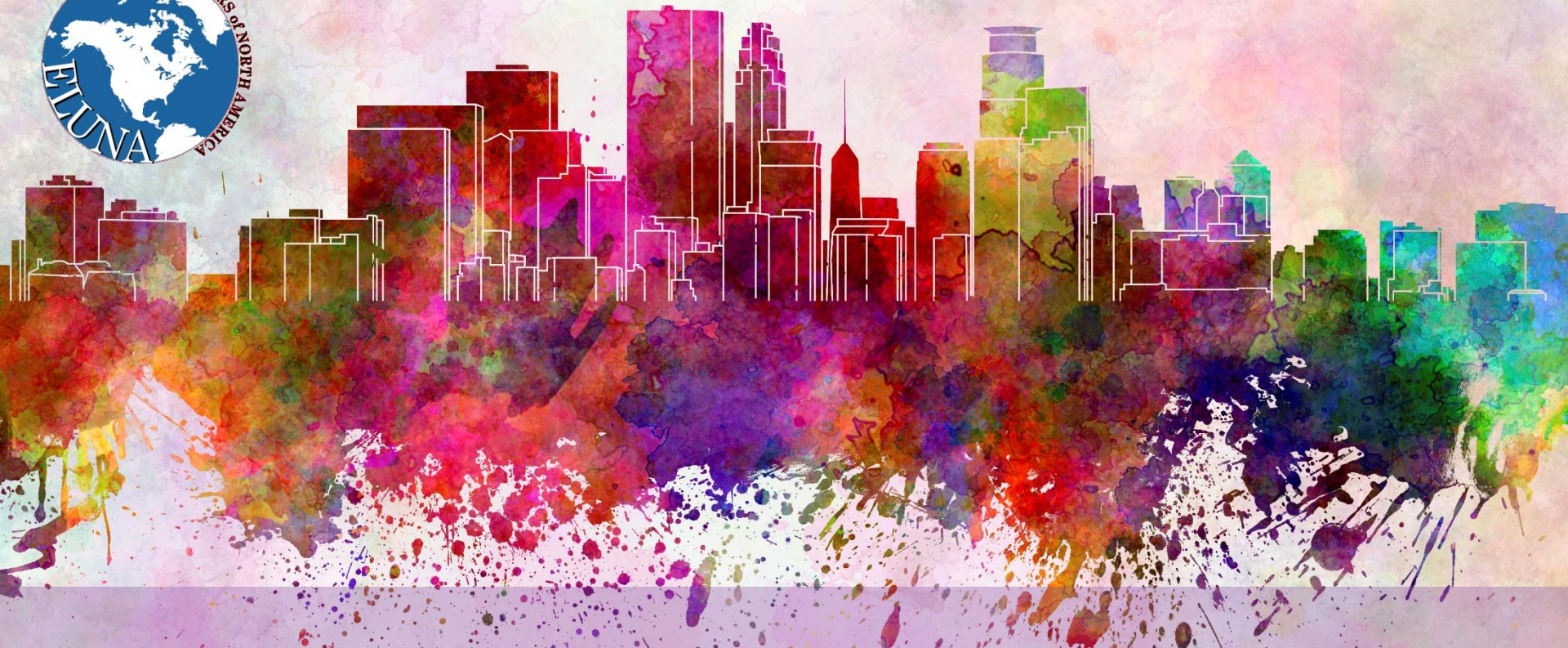


Workflow & Integrations – Borrow & Lend



Workflow & Integrations – Borrow & Lend





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ILLiad and Alma

Together at Last

ILLiad Processing Overview

- Borrowing
 - Item received by staff – Check in from Lending Library
 - Plug-in sends patron ID, brief bib and due date to Alma
 - Item is created, hold is placed on patron's account
 - Optional – Scan item into Alma to create pickup notice
 - Patron picks up item – item is checked out in Alma
 - Displays in patron's account in Alma and Primo
 - Patron returns item
 - Optional – return item in Alma
 - Return item in ILLiad

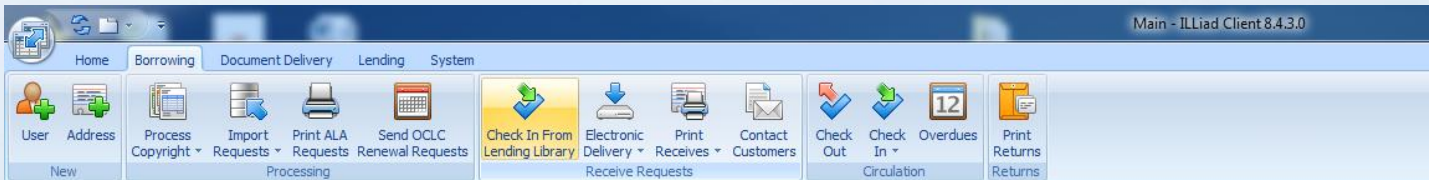
Overview

- Lending
 - Item retrieved by staff
 - Item barcode is added to Ref Number field
 - Item is scanned
 - Plug-in sends barcode and due date to Alma
 - Alma moves the item to the Resource Sharing Library
 - Item is sent back to the library
 - Item is returned in ILLiad – plug-in returns item in Alma
 - Item is scanned at home location in Alma

Borrowing Events

BorrowingRequestCheckedInFromLibrary

Tied to the Check In From Lending Library batch processing form using the Check In, Check In Scan Now, or Check In Scan Later buttons. Will only process Loan transactions – not Articles.



BorrowingRequestCheckedInFromCustomer

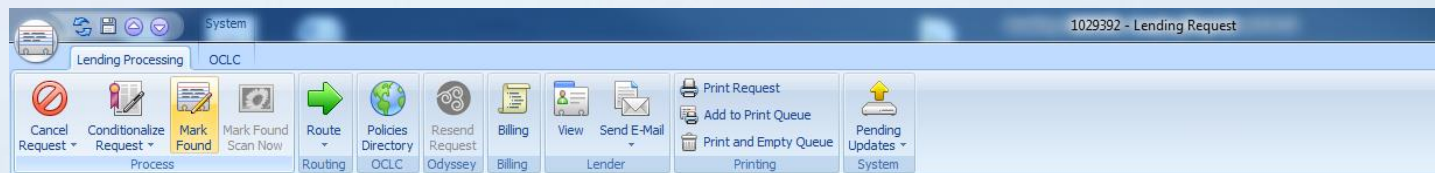
Tied to the Check Item In batch processing form. It will process regardless of its status (such as if it were cancelled or never picked up by the customer). By default this will update Alma as well.



Lending Events

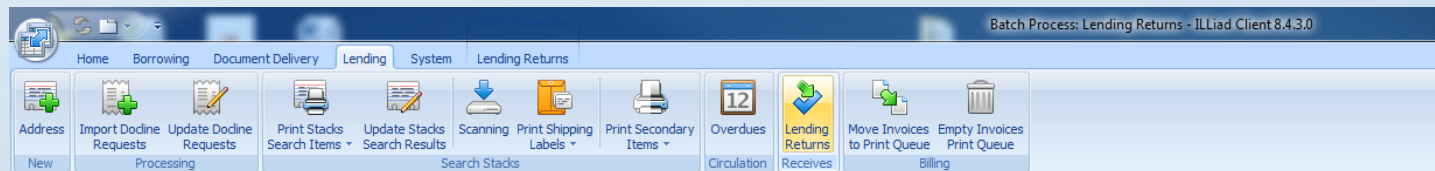
LendingRequestCheckOut

This will trigger whenever a transaction is processed from the Lending Update Stacks Searching form using the Mark Found or Mark Found Scan Now buttons. This will also work on the Lending Processing ribbon of the Request form for the Mark Found and Mark Found Scan Now buttons.



LendingRequestCheckIn

This will trigger whenever a transaction is processed from the Lending Returns batch processing form.



AcceptItem XML (Borrowing Request)

```
<?xml version="1.0" encoding="UTF-8"?>
<NCIPMessage xmlns="http://www.niso.org/2008/ncip" version="http://www.niso.org/schemas/ncip/v2_02/ncip_v2_02.xsd">
  <AcceptItem>
    <InitiationHeader>
      <FromAgencyId>
        <AgencyId>[Your Alma Institution Code]</AgencyId>
      </FromAgencyId>
      <ToAgencyId>
        <AgencyId>[Your Alma Institution Code]</AgencyId>
      </ToAgencyId>
      <ApplicationProfileType>[A code that identifies your ILLiad Instance]</ApplicationProfileType>
    </InitiationHeader>
    <RequestId>
      <AgencyId>[Your Alma Institution Code]</AgencyId>
      <RequestIdentifierValue>TN-[Transactions.TransactionNumber]</RequestIdentifierValue>
    </RequestId>
    <RequestedActionType>Hold For Pickup And Notify</RequestedActionType>
    <UserId>
      <AgencyId>[Your Alma Institution Code]</AgencyId>
      <UserIdentifierType>Barcode Id</UserIdentifierType>
      <UserIdentifierValue>[Transactions.UserName]</UserIdentifierValue>
    </UserId>
    <ItemId>
      <ItemIdentifierValue>TN-[Transactions.TransactionNumber]</ItemIdentifierValue>
    </ItemId>
    <!--
    The below tags are not described in the Harvard/IDS example, but may be used in Alma
    <DateForReturn></DateForReturn>
    <PickupLocation>[Code of library in Alma]</PickupLocation>
    -->
    <ItemOptionalFields>
      <BibliographicDescription>
        <Author>[TransactionNumber.LoanAuthor]</Author>
        <Title>[TransactionNumber.LoanTitle]</Title>
      <!--
      Additional metadata may be sent to Alma that is not described in the Harvard/IDS example
      -->
      </BibliographicDescription>
    </ItemOptionalFields>
  </AcceptItem>
</NCIPMessage>
```

CheckoutItem.xml (Lending Request)

```
<?xml version="1.0" encoding="UTF-8"?>
<NCIPMessage xmlns="http://www.niso.org/2008/ncip" version="http://www.niso.org/schemas/ncip/v2_02/ncip_v2_02.xsd">
  <CheckOutItem>
    <InitiationHeader>
      <FromAgencyId>
        <AgencyId>[Your Alma Institution Code]</AgencyId>
      </FromAgencyId>
      <ToAgencyId>
        <AgencyId>[Your Alma Institution Code]</AgencyId>
      </ToAgencyId>
      <ApplicationProfileType>[A code that identifies your ILLiad Instance]</ApplicationProfileType>
    </InitiationHeader>
    <UserId>
      <UserIdentifierValue>[Any vaule]</UserIdentifierValue>
    </UserId>
    <ItemId>
      <AgencyId>[Your Alma Institution Code]</AgencyId>
      <ItemIdentifierValue>[Tranactions.ReferenceNumber]</ItemIdentifierValue>
    </ItemId>
    <RequestId>
      <AgencyId>[Your Alma Institution Code]</AgencyId>
      <RequestIdentifierValue>TN-[Tranactions.TransactionNumber]</RequestIdentifierValue>
    </RequestId>
    <!--
    The below tag is not described in the Harvard/IDS example, but may be used in Alma
    <DesiredDateDue>2014-03-18T16:17:03.291Z</DesiredDateDue>
    -->
  </CheckOutItem>
</NCIPMessage>
```

CheckInItem XML (Both)

```
<?xml version="1.0" encoding="UTF-8"?>
<NCIPMessage xmlns="http://www.niso.org/2008/ncip" version="http://www.niso.org/schemas/ncip/v2_02/ncip_v2_02.xsd">
  <CheckInItem>
    <InitiationHeader>
      <FromAgencyId>
        <AgencyId>[Your Alma Institution Code]</AgencyId>
      </FromAgencyId>
      <ToAgencyId>
        <AgencyId>[Your Alma Institution Code]</AgencyId>
      </ToAgencyId>
      <ApplicationProfileType>[A code that identifies your ILLiad Instance]</ApplicationProfileType>
    </InitiationHeader>
    <!--      UserId is required for Borrowing side -->
    <UserId>
      <UserIdentifierValue>[Tranactions.UserName]</UserIdentifierValue>
    </UserId>
    <!--      -->
      <ItemId>
        <AgencyId>[Your Alma Institution Code]</AgencyId>
        <ItemIdentifierValue>TN-|
          [BORROWING:Tranactions.TransactionNumber]
          [LENDING:Tranactions.ReferenceNumber]
        </ItemIdentifierValue>
      </ItemId>
      <RequestId>
        <AgencyId>[Your Alma Institution Code]</AgencyId>
        <RequestIdentifierValue>TN-[Tranactions.TransactionNumber]</RequestIdentifierValue>
      </RequestId>
    </CheckInItem>
  </NCIPMessage>
```

Things to Remember

- Have hours set for your Resource Sharing Library
 - “Insufficient Due Date” error
- Pickup notices will be sent out for borrowing requests if the items are scanned at the pickup location
- “Due Today” notice will be sent if you are running them for your institution
- Lending operator has to look-up/add barcode to request
- Lending can only accommodate 1 item per request
- Items not Borrowed/Loaned with plug-in will generate errors when returned

Questions?

- tmcnulty@vcu.edu
- Plug-in can be downloaded at:
 - <https://github.com/vculibraries/alma-ncip>