



Resource Sharing Directory

EX LIBRIS
Knowledge Days

ExLibris®
Part of Clarivate



Agenda

- Introduction
- Contributing to the RS Directory
- Data Sharing Profile
- Adding a Partner
- Demo



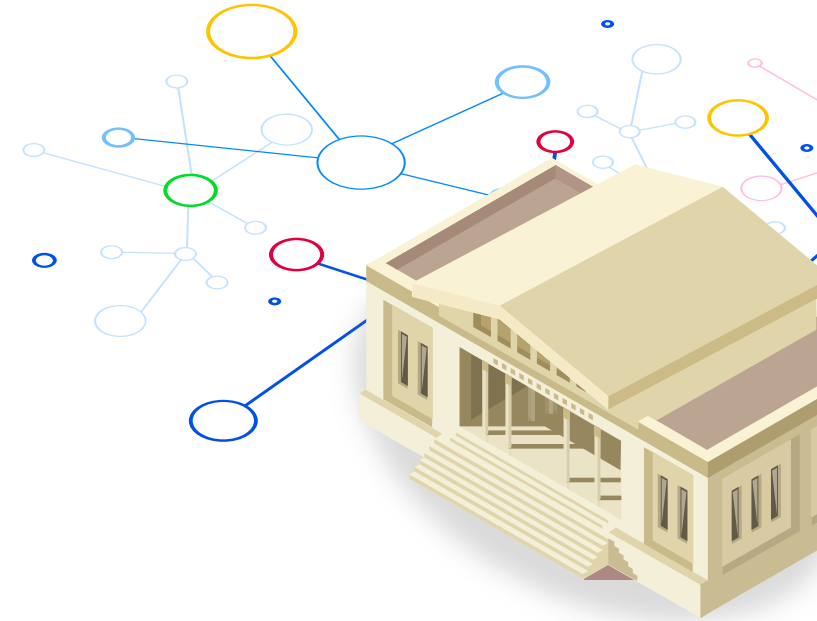
Agenda

- _____
- _____
- _____
- _____
- _____

- **Introduction**
- Contributing to the RS Directory
- Data Sharing Profile
- Adding a Partner
- Demo

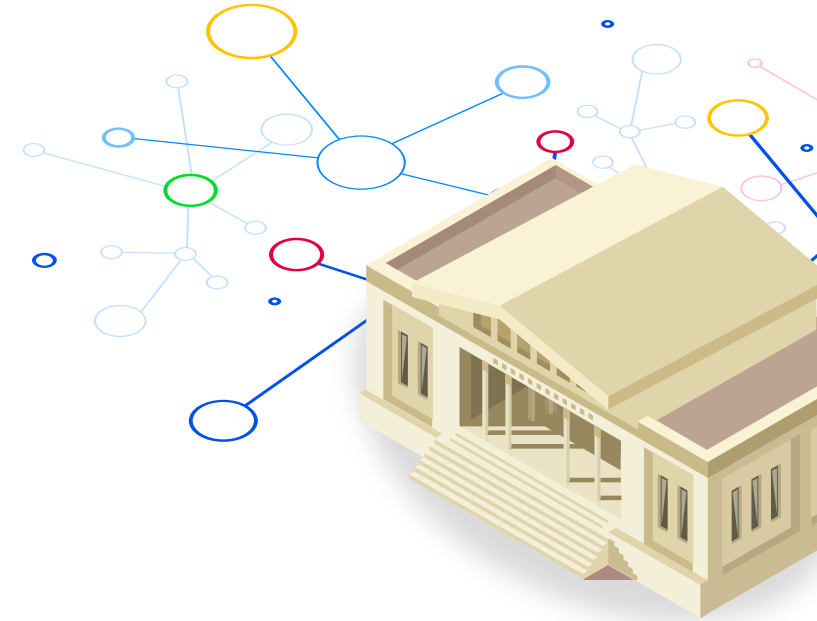
What is the Resource Sharing Directory?

- Alma operates via peer-to-peer Resource Sharing
- The Resource Sharing Directory is a central listing of up-to-date information about Resource Sharing Libraries
- Libraries can opt-in to joining the directory



Why join the Resource Sharing Directory?

- Find new partnerships with other institutions
- Simplify setting up connection details
- Requests can be managed in Alma or in ILLiad





Agenda

- Introduction
- **Contributing to the RS Directory**
- Data Sharing Profile
- Adding a Partner
- Demo

Prerequisites

- **Fulfillment Administrator** role
- At least one Resource Sharing Library



The screenshot shows a configuration form titled "Resource Sharing Information". It contains three fields: "Is resource sharing library" with a checked checkbox, "Itemless" with an unchecked checkbox, and "Symbol" with a text input field containing the value "EXLALMA".

- We recommend having other resource sharing configurations in place (Terms of Use, etc.)

How to Join

- Configuration > Fulfillment > Contribute to Resource Sharing Directory > Resource Sharing Directory Member

The screenshot shows a user interface for adding a new member. On the left, a dropdown menu is open under the heading '+ Add new member'. The menu has two options: 'From Existing Resource Sharing Library' (highlighted with a red border) and 'From New Resource Sharing Library'. The main form is titled 'Select Resource Sharing Library'. It contains a text box with the placeholder 'Resource Sharing Library' and a dropdown arrow. Below the text box is a 'Cancel' button and a 'Save and continue' button.

- Contribute a member record for each Resource Sharing Library you want to be available as a partner
- We do **not** recommend creating a new Resource Sharing Library – this will require fully configuring that new library

How to Join

← Edit Resource Sharing Member 1 2 3 Cancel Next

Member Attributes

Institution Name **Training - Sandbox**

Name * **Resource Sharing Library**

Description

Category

Pods I'm part of

Status **Active**

Currency **US Dollar**

Manage request in Alma ILLiad

Member Address

Address line 1 * **1060 W. Addison St** Address line 2

Address line 3 Address line 4

Address line 5

City * **Chicago**

State/Province **IL** Postal code **60613**

Country * **United States**

How to Join

< Edit Resource Sharing Member

1 2 3 Cancel Next

Member Attributes

Institution Name **Training - Sandbox**

Name * **Resource Sharing Library**

Description

Category

Pods I'm part of

Status **Active**

Currency **US Dollar**

Manage request in Alma ILLiad

Server *

Port *

ISO symbol *

How to Join

- Define participating items to indicate which physical items you are willing to lend

← Edit Lending Policies 1 2 3 Cancel Back Next

Supplies physical items

Participating Items + Add Participating Items ⌵ ⌵ ⚙️

	Name	Description	
1	Books	where (Material type equals (Book) AND Item policy not equals (Not for Loan) AND Current location equals ((Graduate Library : Grad Stacks) or (Science Library : Science Stacks) or (Music Library : Music Stacks) or (Law Library : Law Stacks) or (Main Library : Main Stacks)))	⋮
2	Media	where (Material type equals (Blu-Ray or DVD) AND Current location equals ((Main Library : Main Media Collection)))	⋮

How to Join

- Participating items can be defined by Material Type, Item Policy, and/or Location

Add Participating Items



Name *

Material Type	<input type="text" value="Equals"/> ▼	<input type="text"/>
Item Policy	<input type="text" value="Equals"/> ▼	<input type="text"/>
Location	<input type="text" value="Equals"/> ▼	<input type="text"/>

How to Join

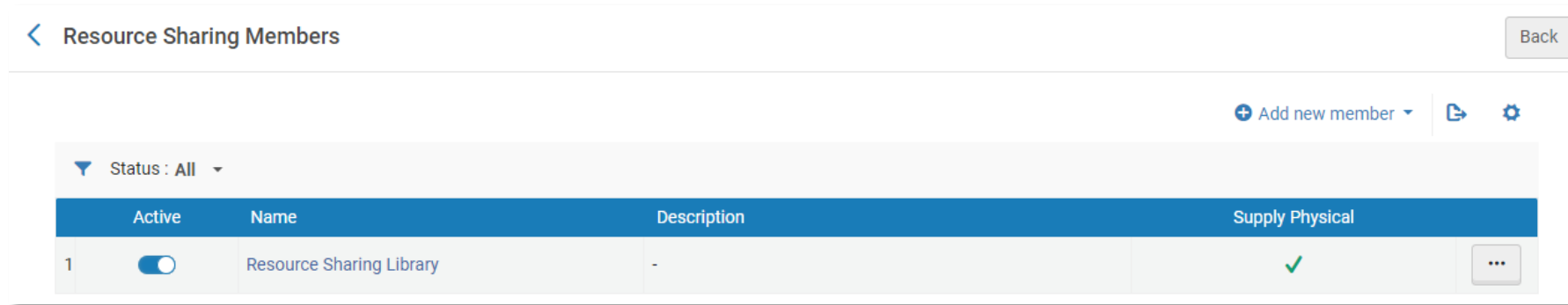
- Define Lending Policies for Participating Items
- These policies are informational only, but they can help other institutions identify whether you are a potential partner

Physical Items Lending Policies

[+ Add Physical Lending Policy](#)  

Participating Items	Supply Term For	Delivery Time (days)	Loan Period (days)	Cost	Allow Renewal	Allow Rush	Expiry Time (Days)	
1. Books	Canada, United States	7	120	0.00 USD	✓		-	...
2. Media	United States	7	45	0.00 USD			-	...

Updating Information



The screenshot shows a web interface for managing Resource Sharing Members. At the top, there is a breadcrumb navigation link for 'Resource Sharing Members' and a 'Back' button. Below this, there are controls for adding new members and settings. A filter dropdown is set to 'Status: All'. The main content is a table with the following data:

Active	Name	Description	Supply Physical
<input checked="" type="checkbox"/>	Resource Sharing Library	-	✓

- Any changes made to your Resource Sharing Member will be synchronized by a scheduled job
- Partner institutions will see the updates in their environment the next day
 - Note that this means local changes to community partners (address, etc.) may be overwritten when the synchronization completes



Agenda

- Introduction
- Contributing to the RS Directory
- **Data Sharing Profile**
- Adding a Partner
- Demo

Data Sharing Profile

- Configuration > General > General Configuration > Data Sharing Profile
- **Optional:** share physical holdings information for Resource Sharing



Data Sharing Profile

RESOURCE SHARING

Confirm making holdings information of my institution searchable and visible to other Alma and Rapido institutions for purposes of availability and requestability of items for resource sharing. This could provide an opportunity for your institution to establish new resource sharing partnerships and networks with other institutions that agree to do so. Allowing your institution's holdings information to be shared for this purpose does not mean that your institution is required to allow resource sharing with any other institutions. None of your users' personal data is used. *

Yes No



Agenda

- [Placeholder text]
- [Placeholder text]
- [Placeholder text]
- [Placeholder text]
- [Placeholder text]

- Introduction
- Contributing to the RS Directory
- Data Sharing Profile
- **Adding a Partner**
- Demo

Adding a Partner

- Add a partner from the **Community** tab of the Resource Sharing Partner List
 - Fulfillment > Resource Sharing > Partners
 - **Role required:** Resource Sharing Partners Manager

Resource Sharing Partner List

Institution **Community**

1 - 20 of 592 Description 0 rows selected Copy

<input type="checkbox"/>	▲ Name	↕ Description	Lending Terms	Location Terms	↕ ISO Symbol	<input type="button" value="⋮"/>
1	<input type="checkbox"/> Aberystwyth University - Document Supply (Community)	-	-	-	AB/U-1	<input type="button" value="⋮"/>
2	<input type="checkbox"/> Albion College - Albion College Library (Community)	-	-	-	ALBIONRS	<input type="button" value="⋮"/>
3	<input type="checkbox"/> Alfred State College - Alfred State Library (Community)	SUNY Library - contact info@slcny.libanswers.com before adding	Delivered in 7 days Keep for 112 Cost 0.0 USD	ALL	SUNYALF	<input type="button" value="⋮"/>

Copy
View hidden

Adding a Partner

< Resource Sharing Partner

Cancel

Save

General Information

Contact Information

Parameters

Notes

Code * TRAINING_MEMBER1_RESOURCE_SHARING_LIBRARY

Name * Network Member 1 - Resource Sharing Library (Community)

Profile Type * ISO

Status Active

System Type * Alma

Average Supply Time 0

Delivery Delay (days) 0

Currency

Locate Profile Network Member 1 - Resource Sharing Library (Comm)

Institution Code TRAINING_MEMBER1_CLEAN

Holdings Code

Supports Borrowing

Borrowing Workflow

Supports Lending

Lending Workflow

Automatic Claim/Cancel (active only when Resource Sharing Claiming and Cancellation job is active)

Automatic Claim

Automatic Cancel

Adding a Partner

< Resource Sharing Partner

Cancel Save

General Information

Contact Information

Parameters

Notes

Addresses

1 - 1 of 1

+ Add Address



	▲ Preferred	Address	↕ Created By	↕ Creation Date	Type	
1.	✓	333 W. 35th Street Chicago IL 60616 USA	Bellavia, Rachel	05/03/2023 15:38:30 EDT	Shipping	⋮

Phone Numbers

1 - 1 of 1

+ Add Phone Number



	▲ Preferred	Phone Number	Created By	Creation Date	Type	
1.	✓	555-555-5555	Bellavia, Rachel	05/03/2023 15:38:30 EDT	-	⋮

Email Addresses

1 - 1 of 1

+ Add Email Address



	↕ Preferred	Email Address	▲ Created By	Creation Date	Type	
1.	✓	ill@library.edu	Bellavia, Rachel	05/03/2023 15:38:30 EDT	-	⋮

Adding a Partner

< Resource Sharing Partner

Cancel

Save

General Information

Contact Information

Parameters

Notes

ALTERNATIVE DELIVERY ADDRESS

Supports ADD Address

GENERAL INFORMATION

Server *

Port *

Symbol *

Request Expiry No expiry Expire by interest date Expiry time

Expiry Time (days) *

Send Requester Information

Shared Barcodes

Ignore Lender Shipping Cost

Resending Overdue Days Interval

Adding a Partner

- A locate profile will be automatically created for the copied partner
 - The locate profile can be configured at Configuration > Fulfillment > Resource Sharing > Locate Profiles

Locate Profiles List

1 - 4 of 4 [+ Add Locate Profile](#)

	Name	Description	
1	Network Member 1 - Resource Sharing Library (Community)	Downloaded from community zone	...

Adding a Partner

- A locate profile will be automatically created for the copied partner
 - The locate profile can be configured at Configuration > Fulfillment > Resource Sharing > Locate Profiles

Locate Profiles List

1 - 4 of 4 [+ Add Locate Profile](#)

	Name	Description	
1	Network Member 1 - Resource Sharing Library (Community)	Downloaded from community zone	<input type="button" value="More"/>

Adding a Partner

Locate Profile Details | Locate Profile Parameters

Server * Port

Username Password

Institution *

Alma Network

Check item availability

Ignore Electronic and Digital Resources ?

Check item requestability

Allow locate by metadata

Locate by fields

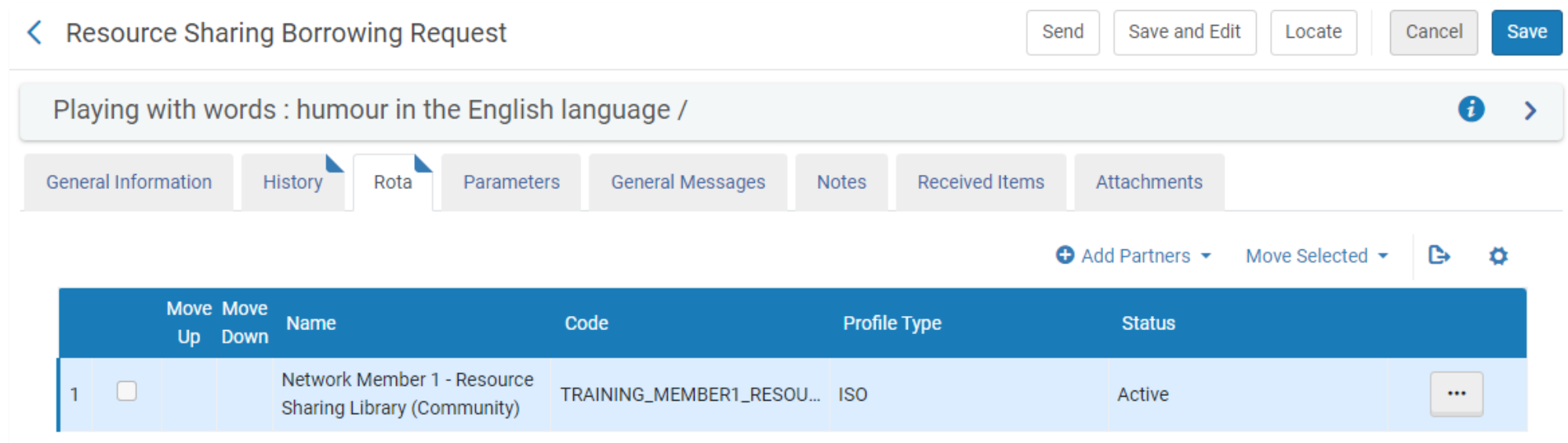
Locate only if all fields match Yes No

?

<input checked="" type="checkbox"/> Author	<input type="checkbox"/> Barcode
<input type="checkbox"/> DOI	<input type="checkbox"/> Edition
<input checked="" type="checkbox"/> ISBN / ISSN	<input checked="" type="checkbox"/> LCCN (010)
<input checked="" type="checkbox"/> System Control	<input type="checkbox"/> Other Standard ID
Number	
<input checked="" type="checkbox"/> Title	

Adding a Partner

- Once copied, the partner can be added to Borrowing Requests
- The partner can also be added to Rotas to continue the Resource Sharing partnership in future item requests



The screenshot shows the 'Resource Sharing Borrowing Request' interface. At the top, there are buttons for 'Send', 'Save and Edit', 'Locate', 'Cancel', and 'Save'. Below this is a search bar containing the text 'Playing with words : humour in the English language /'. A navigation bar below the search bar includes tabs for 'General Information', 'History', 'Rota', 'Parameters', 'General Messages', 'Notes', 'Received Items', and 'Attachments'. The 'Rota' tab is currently selected. Below the navigation bar, there are buttons for '+ Add Partners', 'Move Selected', and a settings icon. The main content area displays a table with the following columns: 'Move Up', 'Move Down', 'Name', 'Code', 'Profile Type', and 'Status'. The table contains one row with the following data:

Move Up	Move Down	Name	Code	Profile Type	Status
1	<input type="checkbox"/>	Network Member 1 - Resource Sharing Library (Community)	TRAINING_MEMBER1_RESOU...	ISO	Active

Adding a Partner

Does this mean I can copy a partner from the Directory and immediately begin sending them requests?



- The Lending Institution also needs to add your partner record to complete the connection and enable Resource Sharing
- Once both institutions have added each other as partners, the relationship is established and you can begin sending requests back and forth



Agenda

- _____
- _____
- _____
- _____
- _____

- Introduction
- Contributing to the RS Directory
- Data Sharing Profile
- Adding a Partner
- **Demo**



Conclusion

Additional Resources

- Contributing to the Resource Sharing Directory

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/030Fulfillment/050Resource_Sharing/040Contributing_to_the_Resource_Sharing_Directory](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/030Fulfillment/050Resource_Sharing/040Contributing_to_the_Resource_Sharing_Directory)

- Resource Sharing Directory FAQs

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/030Fulfillment/050Resource_Sharing/040Contributing_to_the_Resource_Sharing_Directory/Resource_Sharing_Directory_FAQs](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/030Fulfillment/050Resource_Sharing/040Contributing_to_the_Resource_Sharing_Directory/Resource_Sharing_Directory_FAQs)

Additional Resources

- Downloading a Resource Sharing Partner from the Directory

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/030Fulfillment/050Resource_Sharing/005Managing_Resource_Sharing_Partners/010Resource_Sharing_Partners](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/030Fulfillment/050Resource_Sharing/005Managing_Resource_Sharing_Partners/010Resource_Sharing_Partners)

- Training Video

https://knowledge.exlibrisgroup.com/Alma/Training/Resource_Sharing/E_Extended_Training/06_The_Exlibris_Resource_Sharing_Directory



Questions?



Thank you!

Please fill out the survey as you
leave the room

EX LIBRIS
Knowledge Days

ExLibris.
Part of Clarivate