Resource Sharing Directory

- Introduction

- Contributing to the RS Directory

- Data Sharing Profile

- Adding a Partner

- Demo

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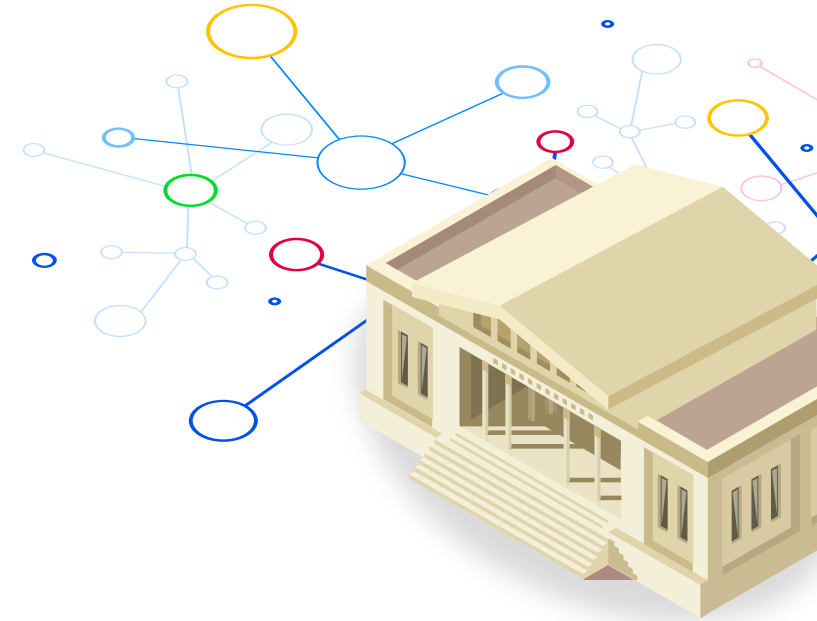- Adding a Partner
- Demo

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

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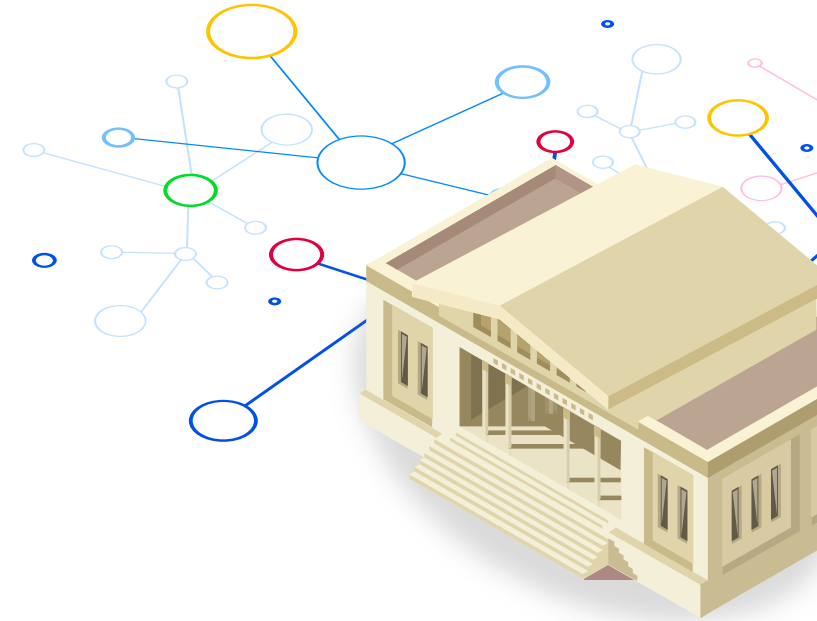
Why join the Resource Sharing Directory?

- Find new partnerships with other institutions

- Simplify setting up connection details

- Requests can be managed in Alma or in ILLiad

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Agenda

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Prerequisites

- **Fulfillment Administrator** role

- At least one Resource Sharing Library

Resource Sharing Information

Is resource sharing library	☑
Itemless	☐
Symbol	**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

- 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

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← Edit Resource Sharing Member

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 ⌄		

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How to Join

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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 *	

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How to Join

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

How to Join

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

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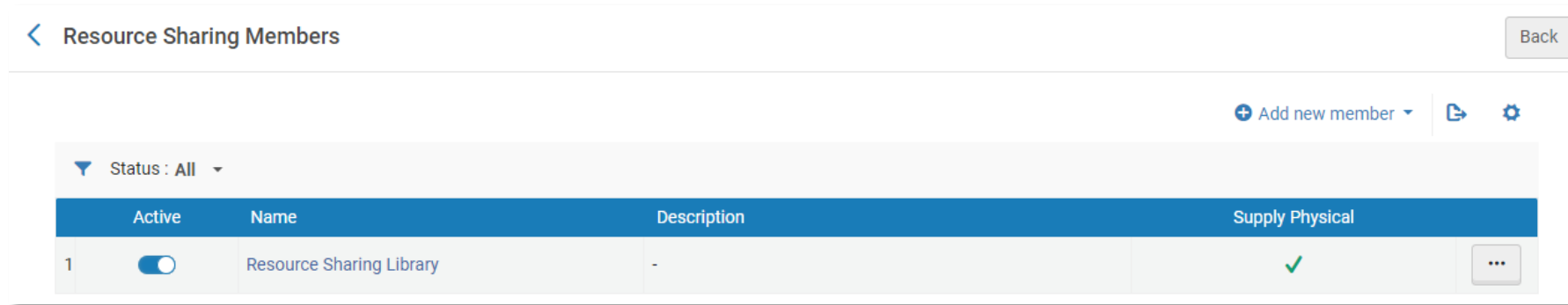
- Define Lending Policies for Participating Items
- These policies are informational only, but they can help other institutions identify whether you are a potential partner

	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			-	⋯

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Updating Information

- 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

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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

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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

	☐ ▲ Name	⇅ Description	Lending Terms	Location Terms	⇅ ISO Symbol	
1	☐ Aberystwyth University - Document Supply (Community)	-	-	-	AB/U-1	...
2	☐ Albion College - Albion College Library (Community)	-	-	-	ALBIONRS	Copy / View hidden
3	☐ 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	...

Adding a Partner

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‹ **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 (Commu** ▾   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 ☐

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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	-	⋯

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Adding a Partner

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< **Resource Sharing Partner**   Cancel   Save

| General Information | Contact Information | **Parameters** | Notes |

ALTERNATIVE DELIVERY ADDRESS

Supports ADD Address ☐

GENERAL INFORMATION

Server * `na07.alma.exlibrisgroup.com`   Port * `9001`

Symbol * `TRAINING_MEMBER1`

Request Expiry   ○ No expiry   ○ Expire by interest date   ● Expiry time

Expiry Time (days) * `3`

Send Requester Information ☐

Shared Barcodes ☐

Ignore Lender Shipping Cost ☐

Resending Overdue Days Interval

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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	Description ▾		🔍		⊕ Add Locate Profile		⚙

	⇕ **Name**	▲ **Description**	
1	Network Member 1 - Resource Sharing Library (Community)	Downloaded from community zone	1 ⋯

Adding a Partner

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Locate Profiles List

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

1 - 4 of 4   Description ▾   🔍   ➕ Add Locate Profile   ⬆   ⚙

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Adding a Partner

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| Locate Profile Details | Locate Profile Parameters |

Server * `na07.alma.exlibrisgroup.com`   Port [ ]

Username [ ]   Password [ ]

Institution * `TRAINING_MEMBER1_CLEAN`

Alma Network ☐

Check item availability ☑

Ignore Electronic and Digital Resources ☐ ⓘ

Check item requestability ☑
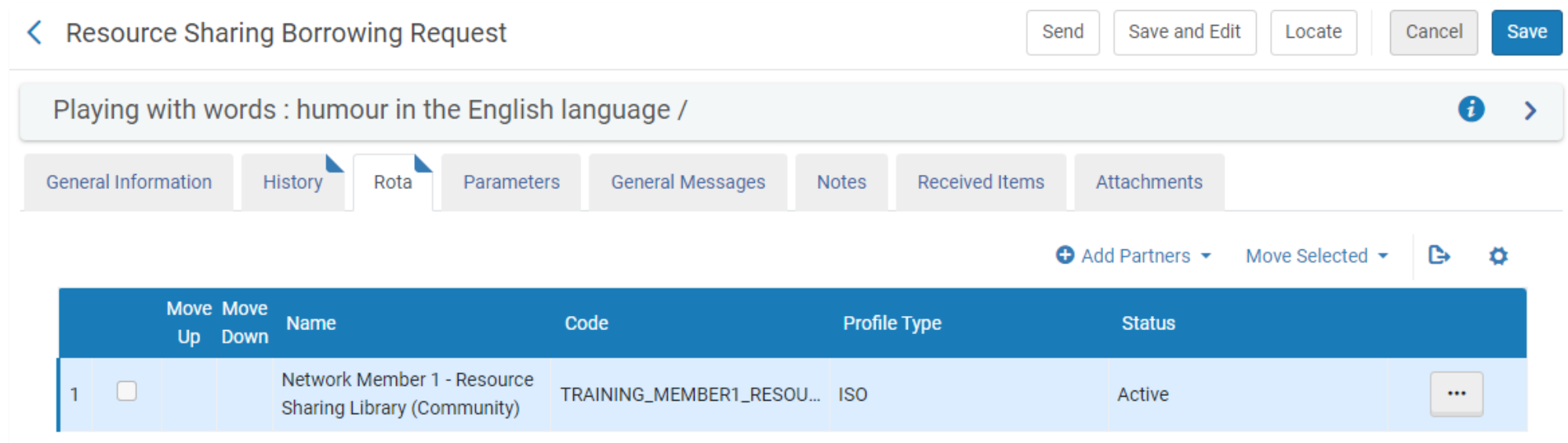
Allow locate by metadata ☐

Locate by fields ☑

Locate only if all fields match   ○ Yes ● No

ⓘ

☑ Author   ☐ Barcode
☐ DOI   ☐ Edition
☑ ISBN / ISSN   ☑ LCCN (010)
☑ System Control ☐ Other Standard ID
    Number
☑ Title

[Test Connection]

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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

Adding a Partner

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

No

- 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

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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

- 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

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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

- Training Video

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

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Questions?

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Thank you!

Please fill out the survey as you leave the room

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