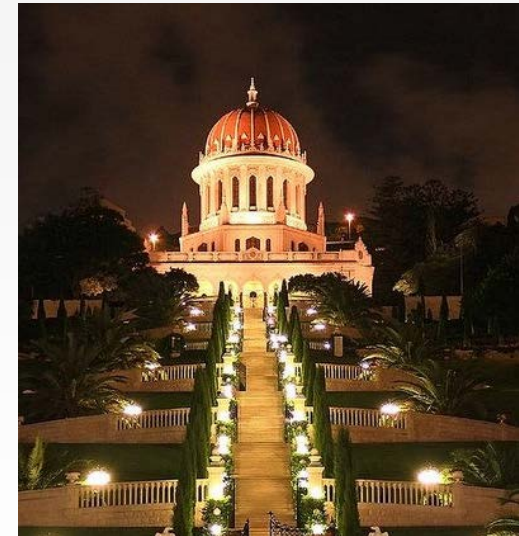




חשתמשו אקס ליבריס - ישראל
Ex Libris Users Group - Israel

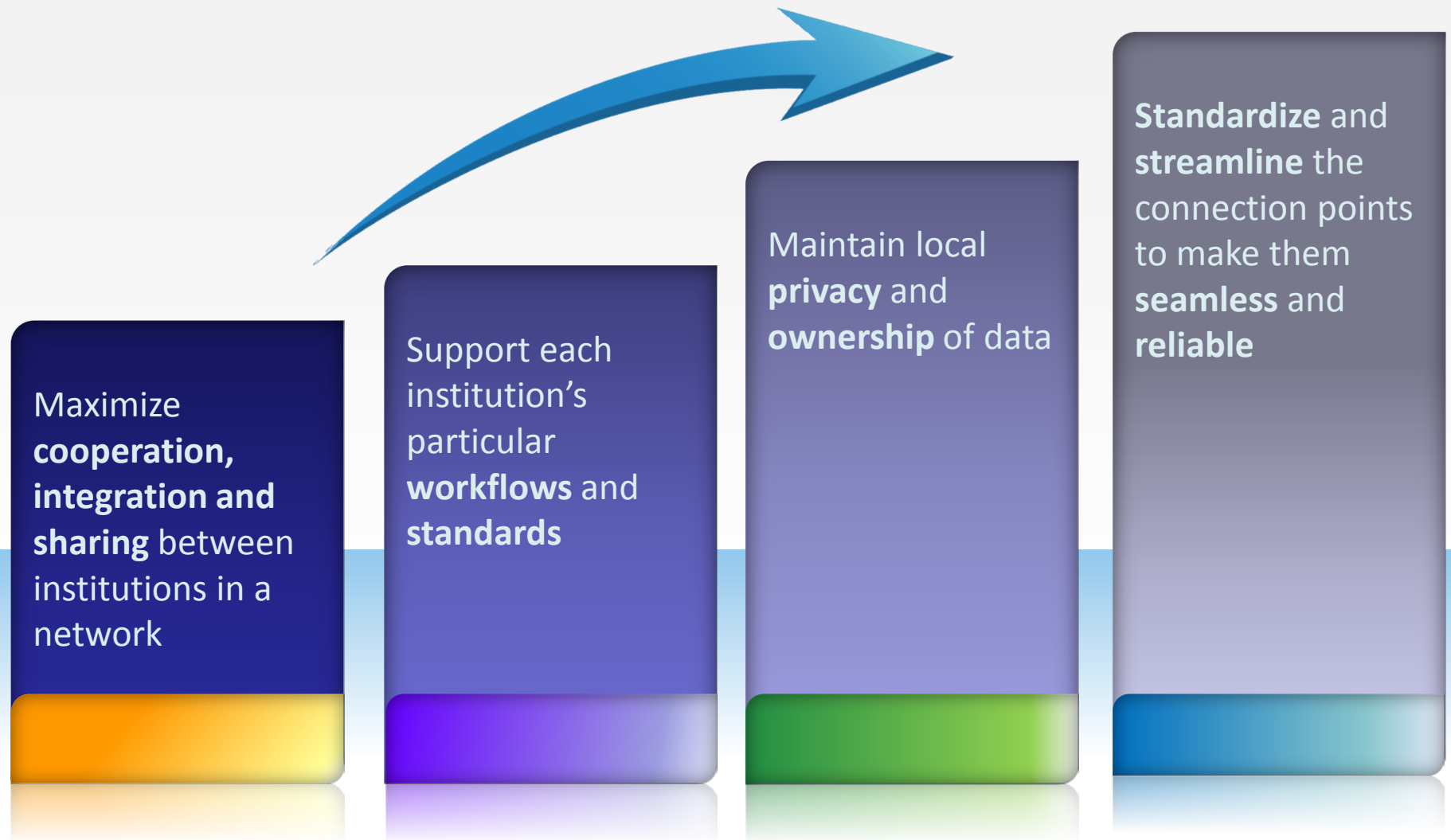


Resource Sharing Models

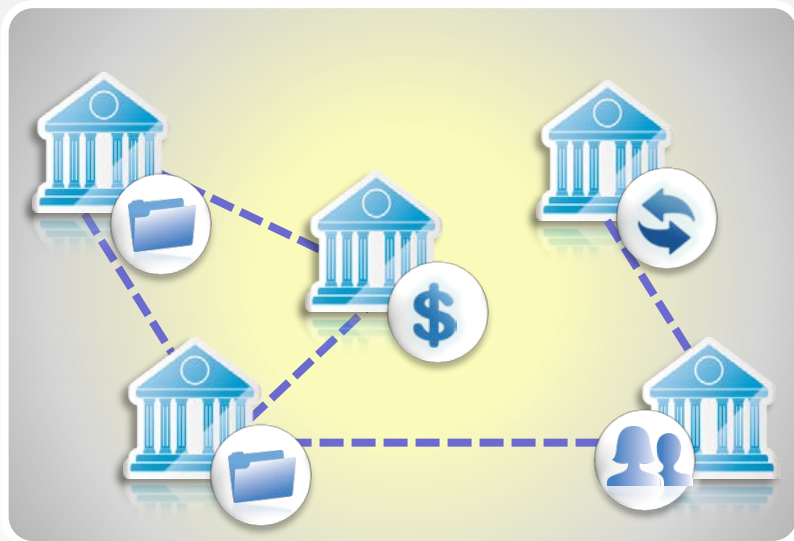
Moshe Shechter

Alma Product Manager, Ex Libris

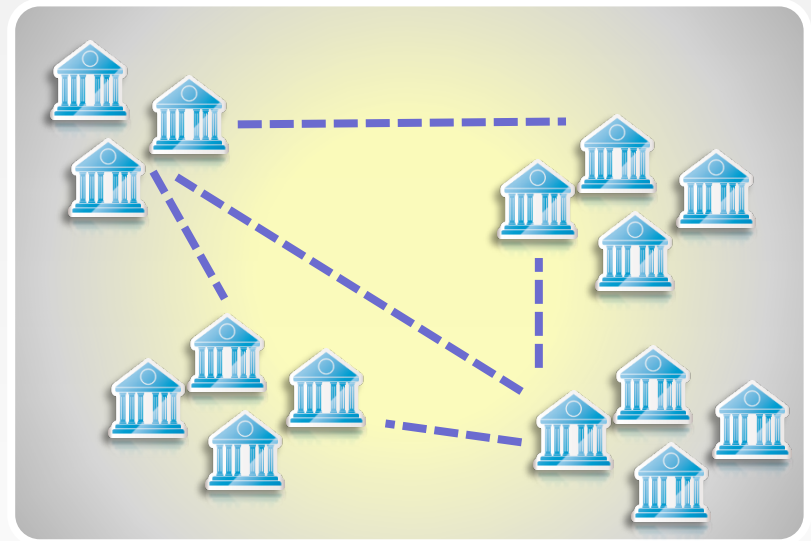
Networks – The Challenge



What is a Collaborative Network?



A group of institutions with relationships/collaboration in a specific library business area (e.g. collection development, resource sharing, remote storage)

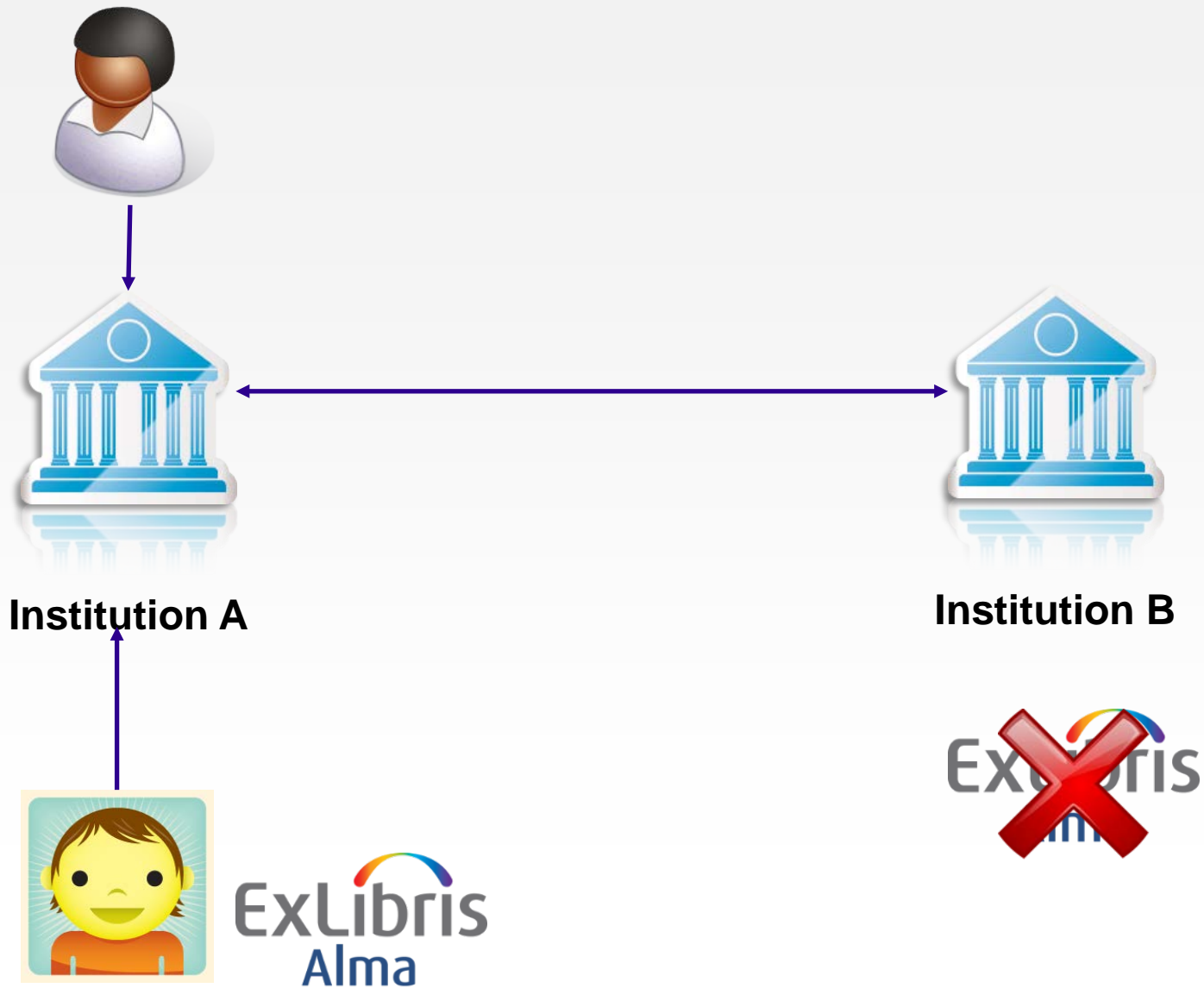


Each institution can be part of many networks in multiple business areas

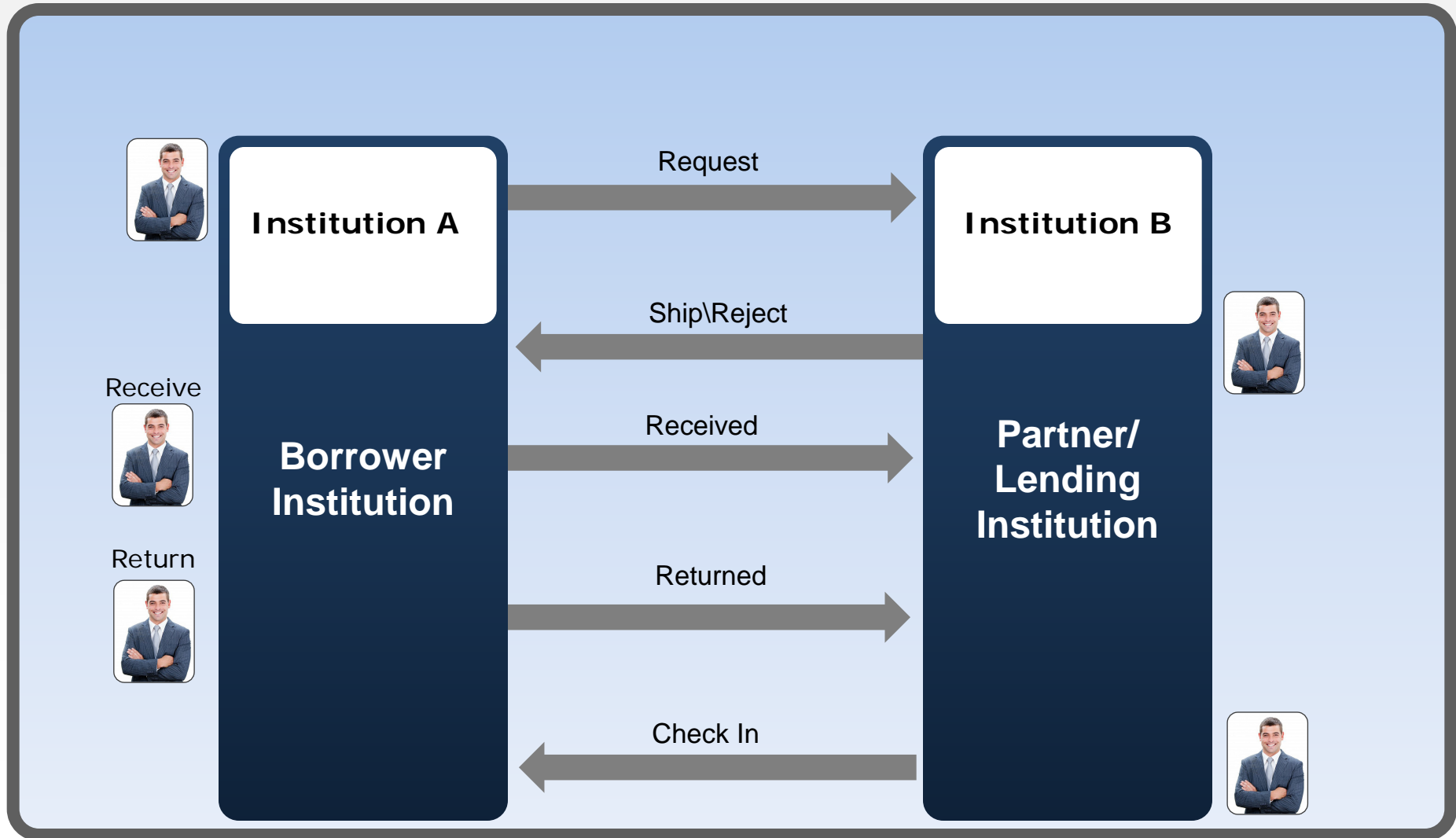
Types of Networks



Resource Sharing Network

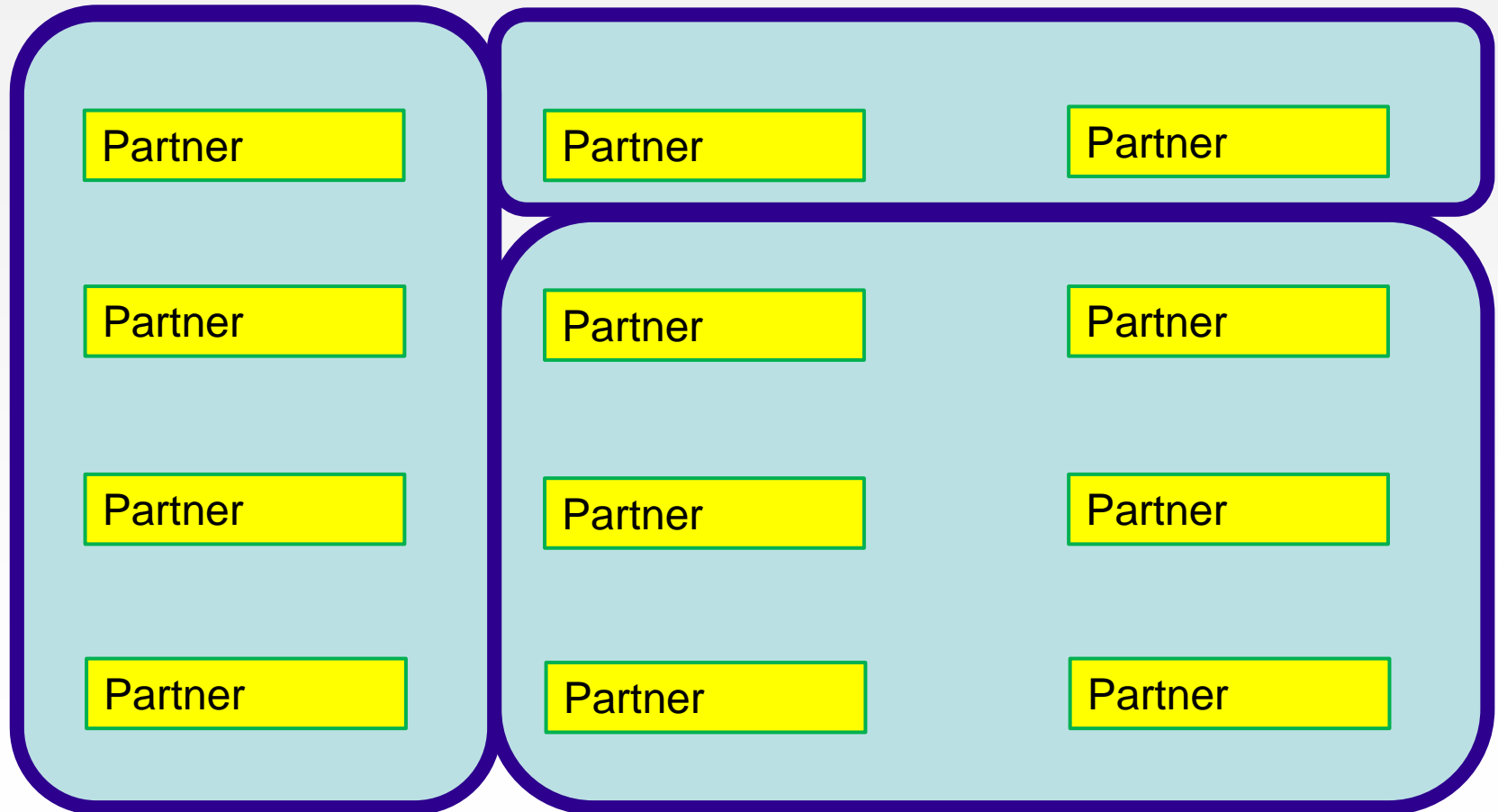


Resource Sharing – Peer to Peer

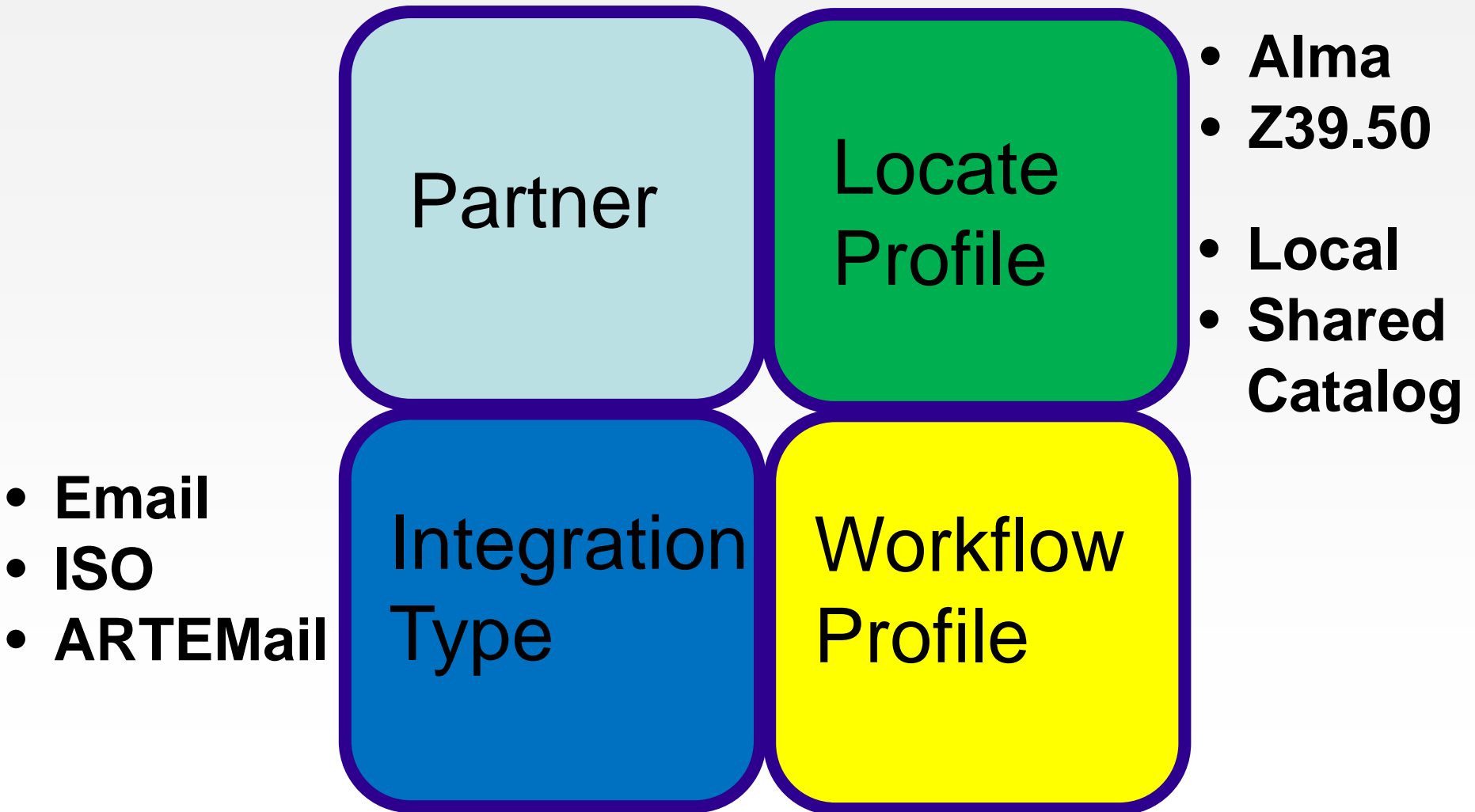


Alma Data Elements and Infrastructure

Rota Templates



Alma Data Elements and Infrastructure



Alma Data Elements and Infrastructure



Borrower
Institution



Request

Temporary
Item

Loan

Rota

Partner

Integration
Type

Locate
Profile
Workflow
Profile

1

Partner

Integration
Type

Locate
Profile
Workflow
Profile

2

Partner

Integration
Type

Locate
Profile
Workflow
Profile

3

Alma Data Elements and Infrastructure



Lender
Institution



Request

Item Moved to
Temporary
Location

Partner

Integration
Type

Workflow
Profile

Resource Sharing Network Attributes

- The patron's home institution is the patron's service provider. The patron receives a resource from his home library, without being exposed to how and where the resource has been obtained. As a result of this, the home institution acts as the lender to the patron.
- The patron's home institution staff uses its own availability information, priorities, and workflow considerations to activate a process for obtaining the resource from a remote network member on behalf of the patron.
- The patron's home institution is responsible for the loaned item from the perspective of the resource owning library.
- The home institution may activate a load balancing process to select the appropriate supplier, as well as a process to approach other suppliers if the selected ones cannot supply the resource.
- The pickup location is always at the patron's home institution.

Resource Sharing Network – User Value

- The Resource Sharing network makes the sharing process transparent for the end user, as follows:
 - It conceals the acquisition of the resource from the end user. The end user simply places a request, without being involved in obtaining the resource.
 - The patron has a single point of contact for the request and loan management – his own library's resource sharing department.

Resource Sharing Network – Considerations

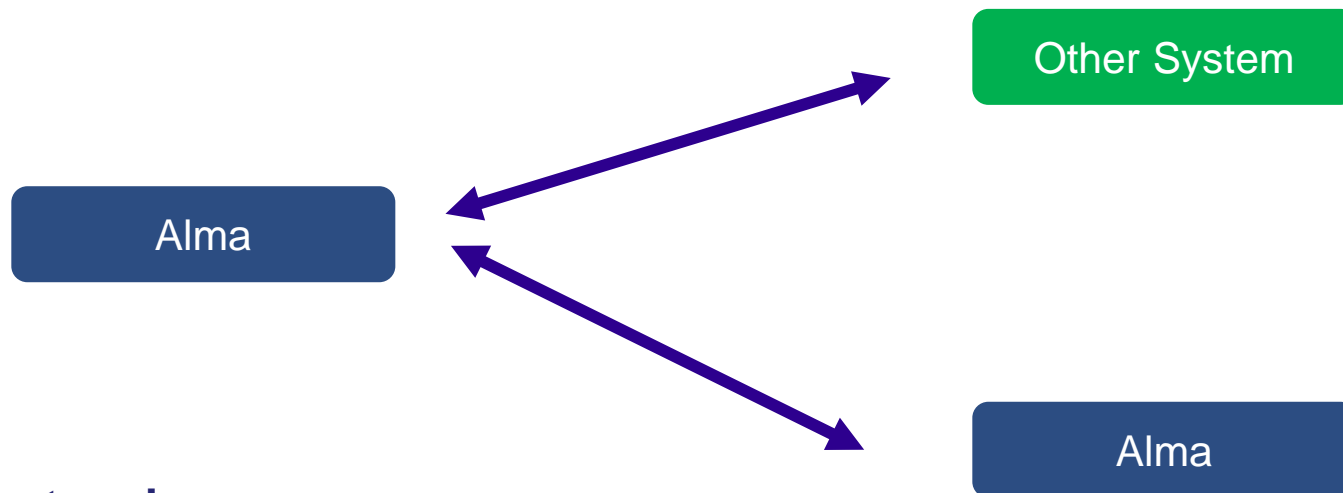
- This type of resource sharing is optimal for situations where there is a loose relationship between the network members:
 - Network member patrons are not identifiable outside of their home library. Therefore, the patrons' circulation activities, such as loans and fines\fees, cannot be directly managed by other network members.
 - The lending policies are managed on the level of the participating libraries and not the participating libraries' patrons.
 - The inventory of the network member is not accessible to other network member patrons.



Existing Models

Resource Sharing the way you like it

Peer to Peer Model



Protocols:

- ISO ILL
- BLARTEmail
- Emails

Request Placement

Borrowing

Citation Linker

Journal Article **Book**

Book Title:

Date (YYYY-MM-DD):

Volume:

Part:

ISBN:

Author Last Name:

Author First Name:

Author Initials:

Publisher:

Publication Date:

Studies by members of the French Department of Yale University.
Yale University. Dept. of French.

[Available Online](#) [Details](#)

[View in a new window](#)

No full text available

[Place Resource Sharing Request](#)

[Find it in Library](#) [Details](#) [Reviews & Tags](#) [Virtual Browse](#)

Boston College Libraries

Resource Sharing Request:

Resource Information:

Citation type: ☒ Book ☐ Article

Title:*

Author (Last name, first name):

Author initials:

ISBN:

Publisher:

Publication date:

Place of publication:

Additional Author (Last name, first name):

Volume:

Part:

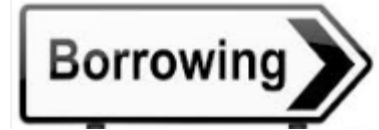
Direct Link


ExLibris


Resource Sharing in Alma



Request Placement



 **Alma**
QA



Tasks Analytics Currently at Res

Resource Sharing Borrowing Request

General Information

Audit

Rota

Parameters

Notes

Attachments

Resource Information

Article\Chapter Title * Ethical Plani

Journal Title The Western

Author Shelby Som

Volume

Author Initials

Issue February/Ma

ISSN 0279-0602

Request Attribute

Title The Western planner.

Requester * Implementer, Ex Libris

Owner Resource Sharing Library

Partner University of Washington

Request Status Ready to be sent

External Identifier

Requested Format Physical

Allow Other Format ☐

Preferred Send Method

Needed By

Delivery Location ☒ Deliver to library ☐ Alternative address

Pickup At * Eugene

Shipping Cost USD

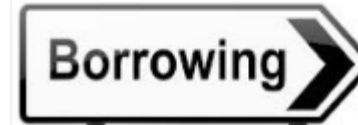
Willing to Pay ☐

Agree to Copyright terms * ☒

Needs patron information ☐

Request Note

Locate and Rota Management



Tasks Analytics Currently at: Res

Rota

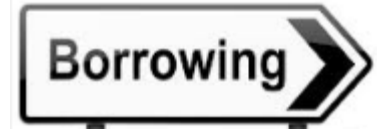
General Information Audit Rota Parameters Notes Attachments

Partners

Partner Place At/Before Last Add partners

	Move Up	Move Down	Name	Code
<input type="checkbox"/>			University of Washington	UW
<input type="checkbox"/>			Clark College	ALLIANCE_CC
<input type="checkbox"/>			Concordia University	ALLIANCE_CONC
<input type="checkbox"/>			Portland Community College	ALLIANCE_PCC
<input type="checkbox"/>			Reed College	ALLIANCE_REED
<input type="checkbox"/>			Oregon Health and Science University	ALLIANCE_OHSU
<input type="checkbox"/>			University of Idaho	ALLIANCE_UID
<input type="checkbox"/>			University of Oregon	ALLIANCE_UO
<input type="checkbox"/>			University of Western States	ALLIANCE_PAHL_UWS
<input type="checkbox"/>			Warner Pacific College	ALLIANCE_WPC

Locate and Rota Management



Alma QA

Tasks Analytics Currently at Reso

Rota

General Information Audit Rota Parameters Notes Attachments

Partners

Partner Place At/Before Last

	Move Up	Move Down	Name	Code
<input type="checkbox"/>			University of Washington	UW

Place At/Before Last

Lender Receives the Request



Alma
QA

Tasks Analytics

Currently at: Resource Sharing Library - ...

Resource Sharing Lending Requests Task List

[Cancel](#) [Being Processed](#)

Limit results to:

Status

[Created lending request \(1\)](#)
[Locate failed \(1\)](#)

Active Partner

[Pacific University \(2\)](#)

Requested Format

[Physical \(2\)](#)

Supplied Format

[Undefined \(2\)](#)

Due date

Assigned to Me **Unassigned** **Assigned to Others**

[Add](#)

Search limited to: Creation Date: **Today**

☐ Select All

1 ☐ [The Western planner.](#)
Article (Terry, Mont. : The Western Planner Vol. 1, no. 1 (Jan.-Feb. 1980)-)
ISSN: 0279-0602 0279-0602
Subject: Periodicals. -- United States, West. -- Regional planning. and others
Availability: Physical version at **builtenv: beper; HT392.5.W4 W4** from:v.33 2012 until:v.35 2014
External Identifier: 1//01ALLIANCEPU0000011
Request Status: Created lending request
Resource Locate Status: Resource Located
[Edit](#) | [Manage Fulfillment Options](#) | [Duplicate](#) | [Reassign](#) | [Search](#) | [Detach from MMS](#) | [Reject](#) | [Print Slip](#) | [Ship non-returnable](#)



Peer to Peer Workflow

- Data Elements and Infrastructure
- Request Placement
- **Fulfillment Options**

Alma Resource Sharing

Request may be fulfilled in a number of formats:



Returnable copy



Digital copy



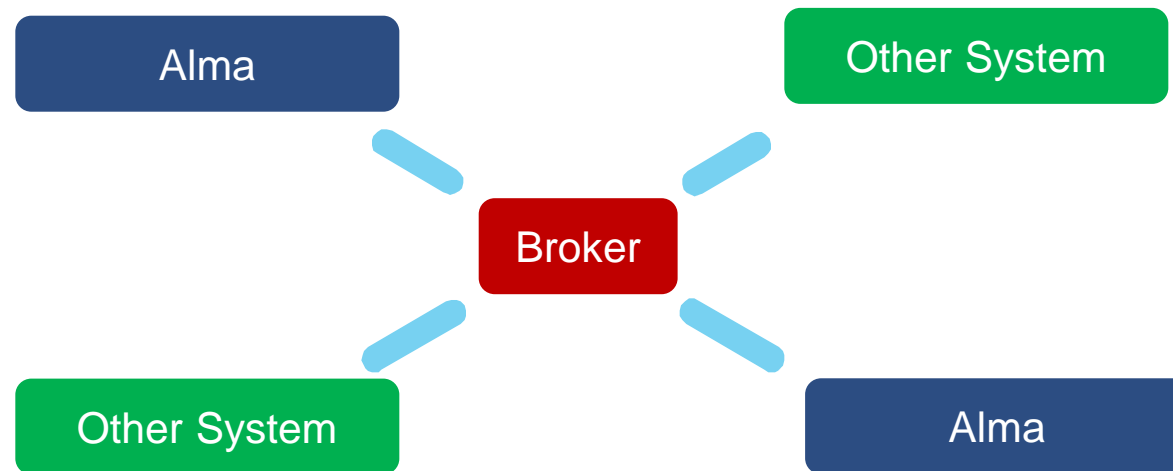
Non Returnable copy



Existing Models

Resource Sharing the way you like it

Broker Model



Systems:

- ✓ Relais D2D/ILL
- ✓ OCLC NRE
- ✓ ILLiad
- ✓ INN-Reach

Protocols:

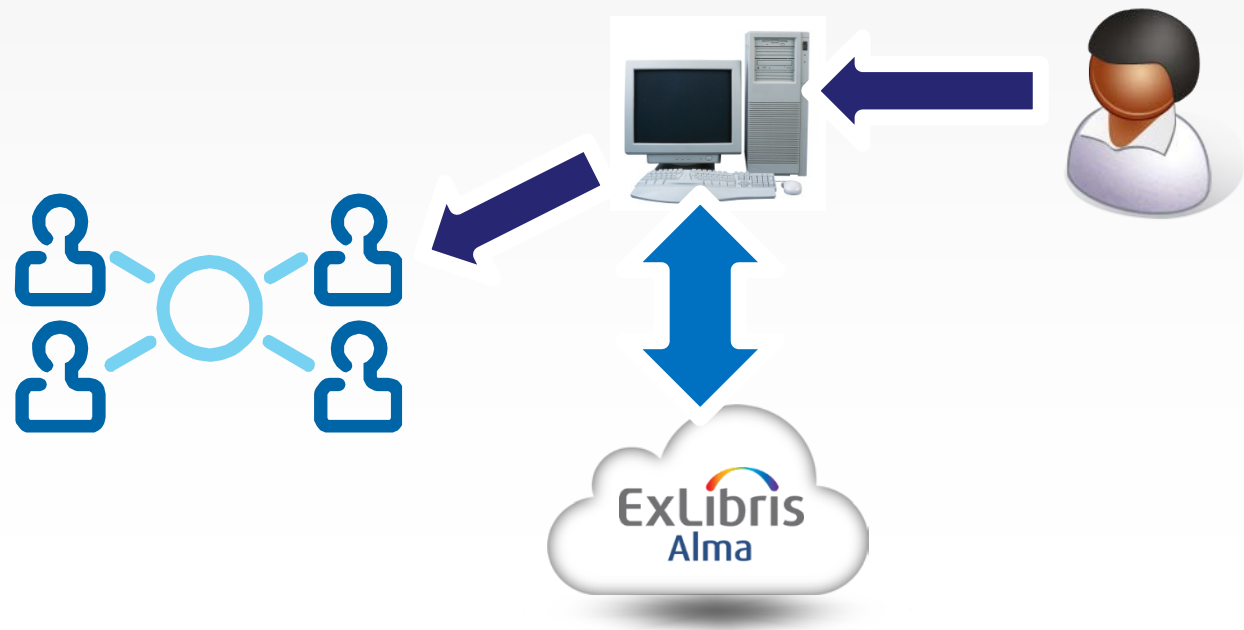
- Z39.50 (OPAC)
- OpenURL
- NCIP (V2.0/V1.0)



Broker Workflow

Broker Based Integrations

Broker based integration is a working model where a dedicated resource sharing system manages the resource sharing process, but relies on Alma for the inventory and the patron management, and for fulfillment aspects of the process.



Broker Based Integrations

Broker based integrations are based on three points of integration:

- Request placement (OpenURL)
- Exposing inventory status (Z39.50 OPAC/Publishing)
- Fulfillment actions – receive, put in transit, loan, return etc' (NCIP)

Broker Based Integrations

Alma is currently used in a broker model with:

- Relais ILL/D2D system
- OCLC WorldCat Navigator
- ILLiad
- INN-Reach

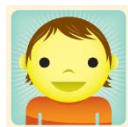


Integration Points

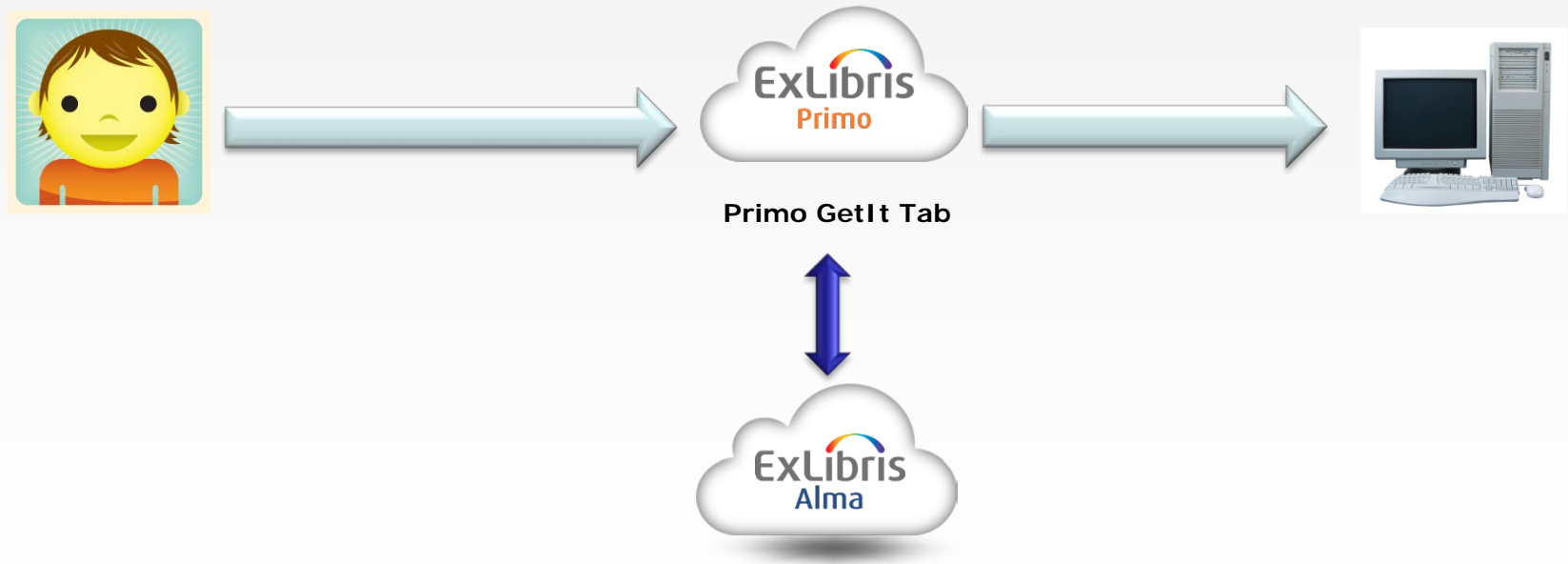
- ✓ Creating the request
- ✓ Being a searchable target
- ✓ Integrating the Fulfillment process

Alma & Broker – Creating the Request

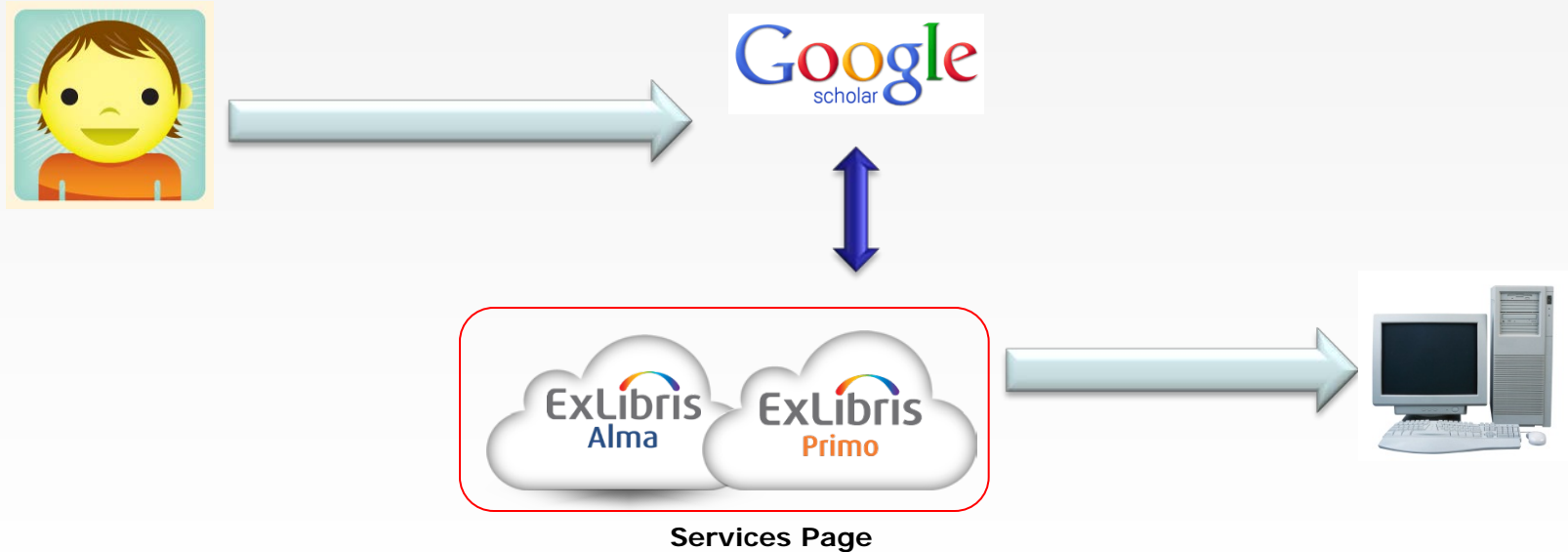
- Patrons may use the broker's discovery
- If using a discovery interface other than the broker as the starting point for searching (e.g. Primo or Google), it is possible to direct users to the Broker discovery.
- To take advantage of this option it is necessary for the discovery interface to generate an OpenURL which includes a query with appropriate search terms



Alma & the "Broker" – Creating the Request



Alma & the "Broker" – Creating the Request



Integration Points

- ✓ Creating the request
- ✓ Being a searchable target
- ✓ Integrating the Fulfillment process

Alma & the "Broker" – Being Searchable

Borrower :
Self and partner ownership

- Based on Z39.50 and OPAC Syntax
- Based on published information

Lender:
Availability and slip printing

- Based on Z39.50 and OPAC Syntax
- Based on published information



Alma & the "Broker" – Being Searchable

```
<holdingsRecord>
  <which>2</which>
  <holdingsAndCirc>
    <typeOfRecord>u</typeOfRecord>
    <encodingLevel>1</encodingLevel>
    <localLocation>Main Library</localLocation>
    <shelvingLocation>Depository</shelvingLocation>
    <callNumber>Heb 9472.800.9</callNumber>
    <copyNumber>1.0</copyNumber>
    <num_volumes>1</num_volumes>
    <num_circulationData>1</num_circulationData>
    <circulationData>
      <circRecord>
        <availableNow>1</availableNow>
        <availabilityDate></availabilityDate>
        <availableThru></availableThru>
        <itemId>HNRNWG</itemId>
        <renewable>0</renewable>
        <onHold>0</onHold>
      </circRecord>
    </circulationData>
  </holdingsAndCirc>
</holdingsRecord>
```

Integration Points

- ✓ Creating the request
- ✓ Being a searchable target
- ✓ Integrating the Fulfillment process

Alma & the "Broker" – Fulfillment Actions

```
- <xs:element name="InitiationHeader">
- <xs:complexType>
- <xs:sequence>
  <xs:element ref="FromSystemId" minOccurs="0" />
  <xs:element ref="FromSystemAuthentication" minOccurs="0" />
  <xs:element ref="FromAgencyId" />
  <xs:element ref="FromAgencyAuthentication" minOccurs="0" />
  <xs:element ref="OnBehalfOfAgency" minOccurs="0" />
  <xs:element ref="ToSystemId" minOccurs="0" />
  <xs:element ref="ToAgencyId" />
  <xs:element ref="ApplicationProfileType" minOccurs="0" />
  <xs:element ref="Ext" minOccurs="0" />
```

Institution

NCIP Partner

Resource
Sharing
Library



NCIP
Partner

Campus A

Resource
Sharing
Library



NCIP
Partner

ExLibris
Alma

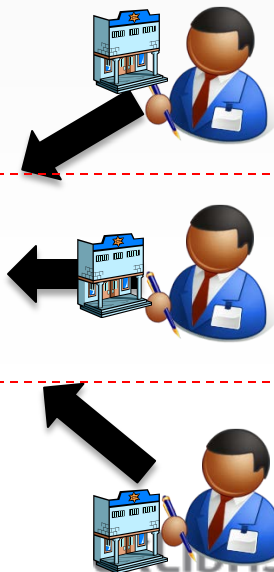


Resource
Sharing
Library



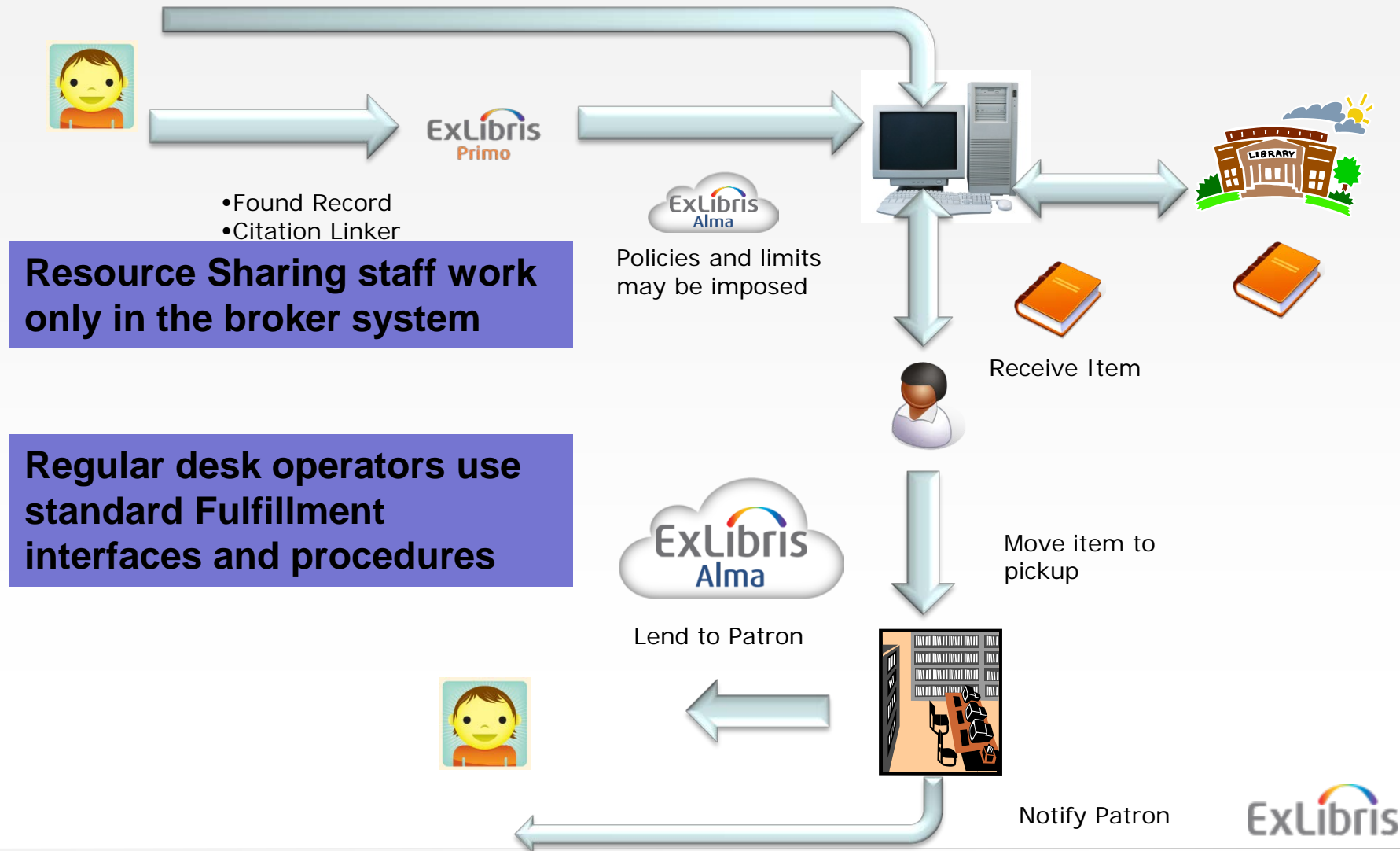
NCIP
Partner

Campus B

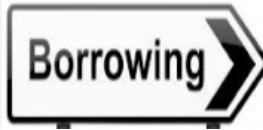


Fulfillment Actions – Borrowing Side

Borrowing



Fulfillment Actions – Borrowing Side



Request information is found at Library Card and Circulation Desk Operators UI

ExLibris
Primo



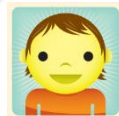
Resource Sharing staff work only in the broker system

Regular desk operators use standard Fulfillment interfaces and procedures

Receive from Patron

Send item back

Item to Resource Sharing Department

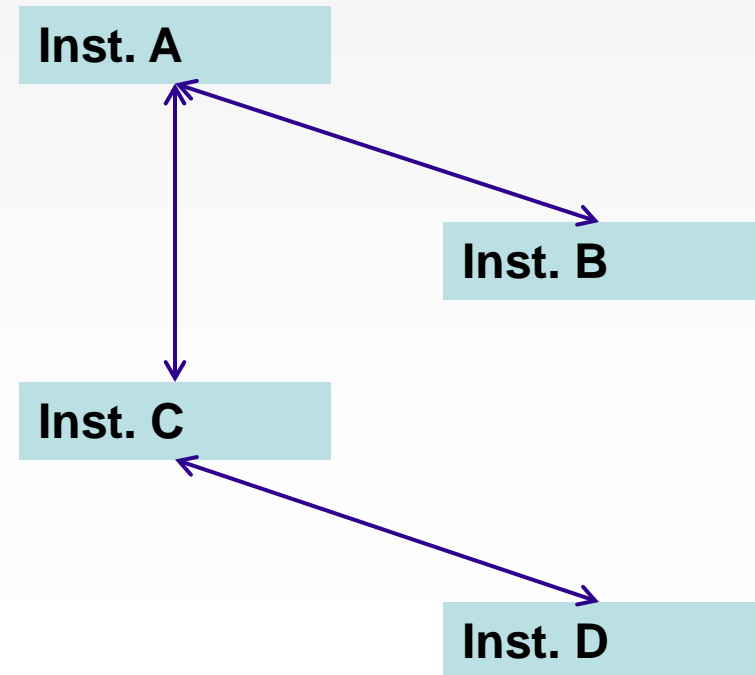


Types of Networks



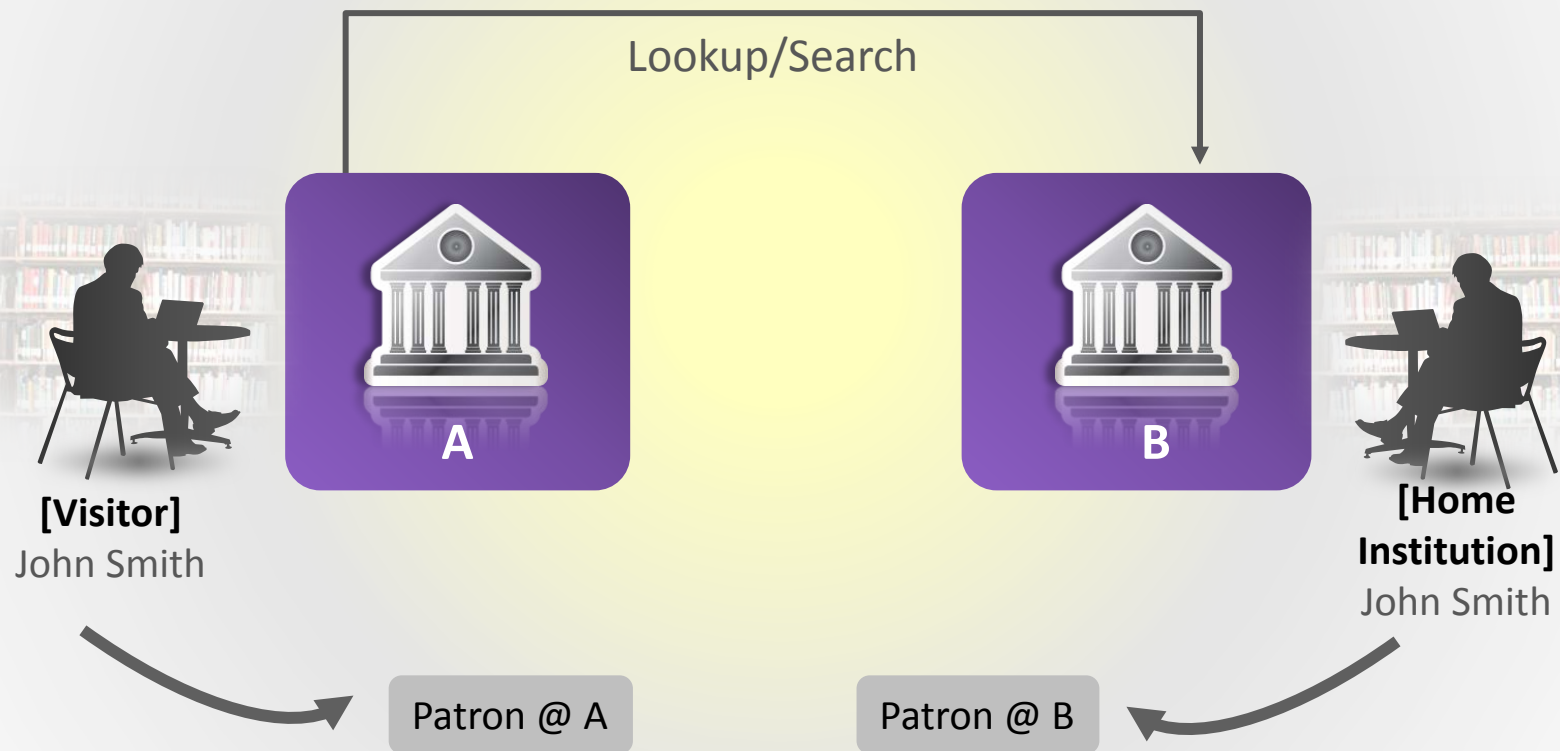
Fulfillment Network - Workflows

- A single institution may participate in multiple fulfillment networks
- Functional Highlights
 - Walk-In Loans
 - Direct Requesting
 - Consortial patron card in Primo




Walk-In Scenario



Patron of Institution B wants to get services at a Institution A desk, for an Institution A resource



Walk-In Scenario


 Patron Identification

Enter patron's ID



Scan patron's ID or search for patron *   **Go**

Use proxy ☐

Find user in other institution ☐

 Patron Identification

Enter patron's ID


Scan patron's ID or search for patron *   **Go**

Use proxy ☐



Find user in other institution ☒

Institution  User identifier **Find User**

Institution B


 Patron Identification

Enter patron's ID

Scan patron's ID or search for patron *   **Go**


Use proxy ☐

Find user in other institution ☒

Institution  User identifier **Find User**

Institution B **U67884223**

Walk-In Scenario

 Quick User Management Cancel Update User

[Renew User](#)

Not local

Find user in other institution ☒

Institution Institution B

User identifier U67884223 Find User

User Details

User Information

First name * Richard



Last name * Adams



PIN number Generate

Job category Please select a value

Gender

Campus

Birth date  

Purge date 21/01/2014  



Middle name John

Primary identifier * 13059535500001021

Job description

User group * Please select a value

Preferred language English

Expiration date 14/01/2014  

Resource sharing library

Email Addresses

Email types * ☐ Personal ☒ School ☐ Work



Email address nosuchmail@no.such.mail.com

Addresses

Address types * ☐ Alternative ☒ Home ☐ School ☐ Work

Street address 10 Gopeng Street

State/Province

Country Republic of Singapore  

15-01 Icon

City 078878

Postal code


Phone Numbers


Phone types ☒ Home ☐ Mobile ☐ Office ☐ Office fax

Phone number 94518398

Cancel Update User

Walk-In Scenario

 Patron Services



Patron Adams, Richard

ID [13059637890001021](#)

User group Guest

Active balance [0.00 USD](#)

[Edit Info](#) [Send Activity Report](#) [Send Return Receipt](#) [Send Loan Receipt](#)


Notes

User Notes (0)

Loans

Returns


Requests

Scan item barcode *  Loan Display



This session ▼

No records were found.

Walk-In Scenario

 Patron Identification

Enter patron's ID


Scan patron's ID or search for patron *   **Go**


Use proxy ☐

Find user in other institution ☒

Institution User identifier **Find User**

[Cancel](#) **Go to Return Items** **Register New User**



 Patron Services



Patron Adams, Richard
ID [13059637890001021](#)
User group Guest
Active balance [0.00 USD](#)
[Edit Info](#) [Send Activity Report](#) [Send Return Receipt](#) [Send Loan Receipt](#)

Notes **User Notes (0)**

Loans **Returns** **Requests**

Scan item barcode *   **OK** **Create Item** Loan Display

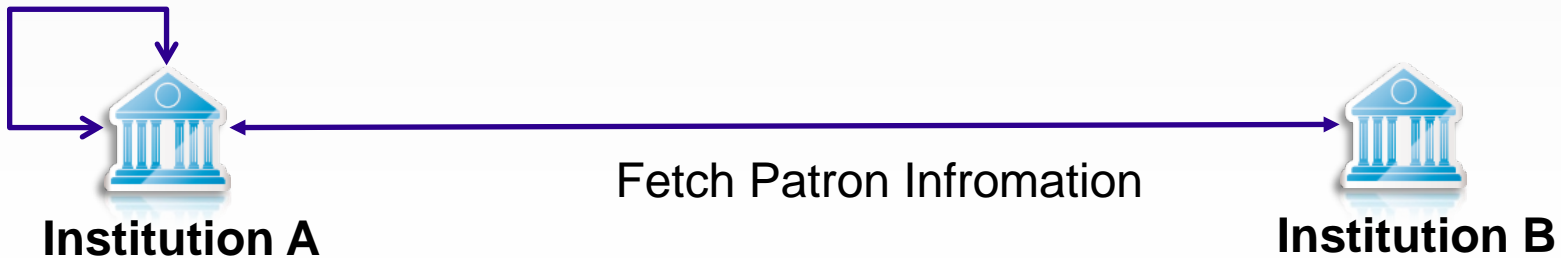
Renew All

No records were found.

Walk-In Scenario – What Actually Happened ?

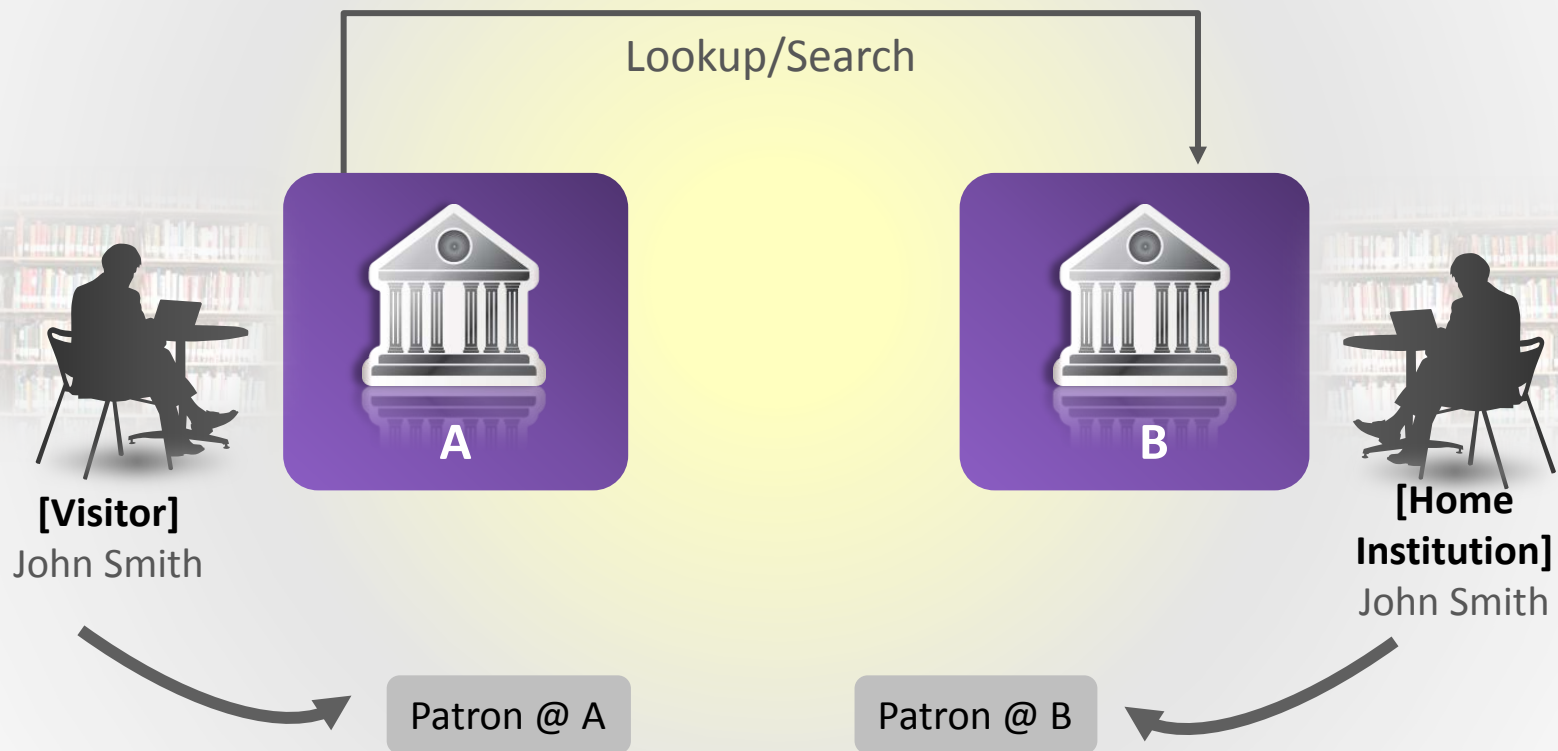
Configuration Option II:

What are my network
Institutions B,C
members ?

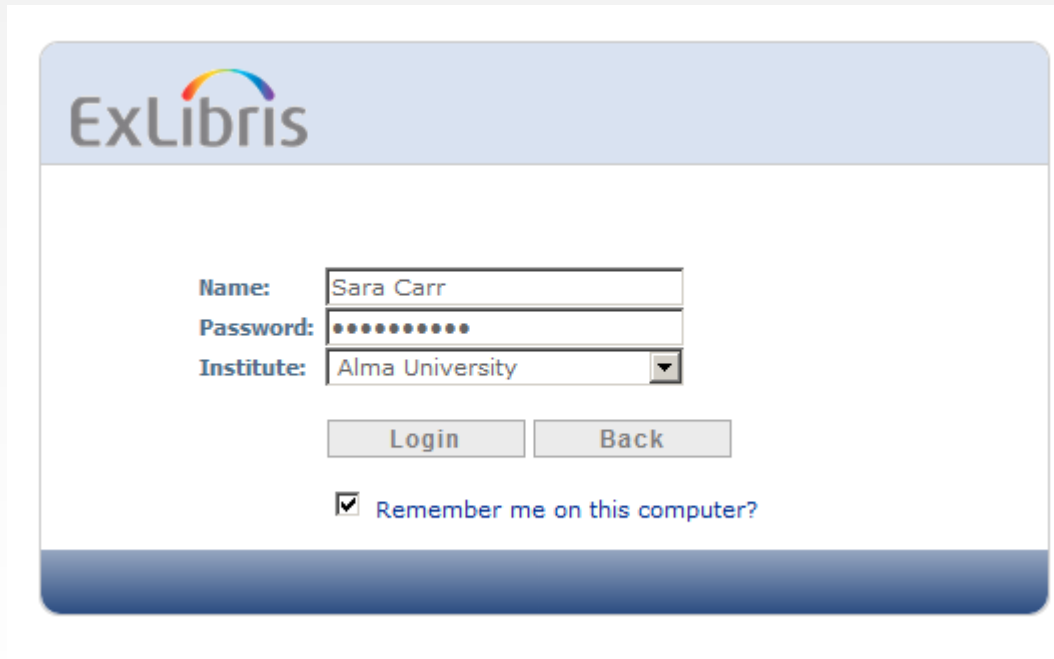


Direct Requesting

Patron of Institution B wants to place a request at a Institution A, for an Institution A resource



Direct Requesting



The image shows a login form for ExLibris. The form is contained within a light blue header bar with the ExLibris logo. Below the header, the form fields are arranged vertically. The 'Name' field contains 'Sara Carr'. The 'Password' field is masked with dots. The 'Institute' field is a dropdown menu showing 'Alma University'. Below the fields are two buttons: 'Login' and 'Back'. At the bottom of the form is a checkbox labeled 'Remember me on this computer?' which is checked.

ExLibris

Name: Sara Carr


Password: ••••••••

Institute: Alma University ▼

Login Back

☒ Remember me on this computer?

Direct Requesting



ExLibris

All Records Course Reserves

Rise and shine Alma Consortium Search Advanced Search Browse Search

3 Results for Alma Consortium


Show only

- Full Text Online (2)
- Available in the Library (1)

Refine My Results

Topic

Use interface (Computer)


 ☆ **Rise and shine, Mariko-chan!**
Chiyoko Tomioka Yoshiharu Tsuchida 1992

Book

● Check holdings



[Get It](#) [Details](#)

Direct Requesting

 **Rise and shine, Mariko-chan!**
Chiyoko Tomioka Yoshiharu Tsuchida 1992

● Check holdings

[Get It](#) [Details](#)

Alma University More(1) Actions  

Request Options: [Request](#) | [Digitization](#) |

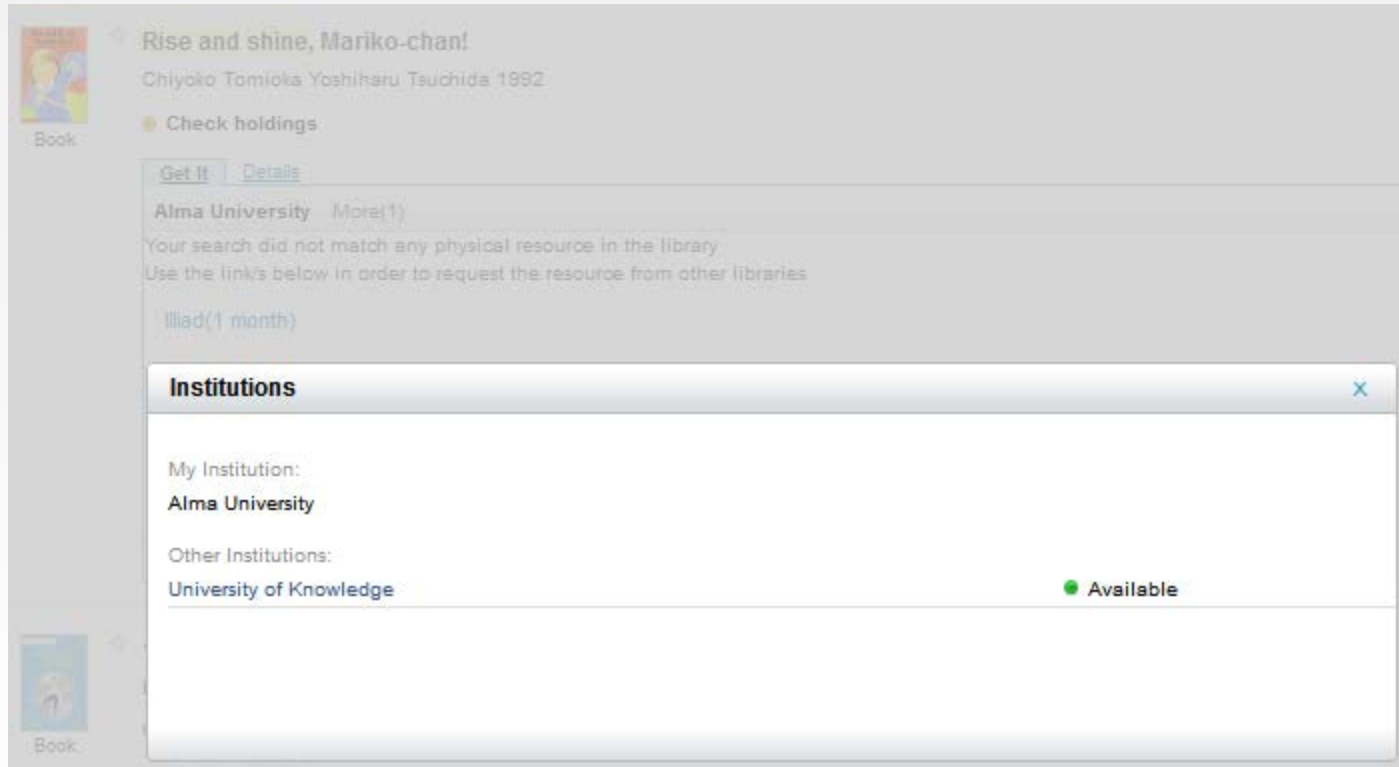
Location: Main Library General Hide Details

Availability: (1 copy, 1 available)

1 - 1 of 1 Records

Barcode	Type	Policy	Description	Status
101860-000010	Book	4 Week		Item not in place

Direct Requesting



The screenshot displays a library catalog interface. On the left, there are two book covers, each labeled 'Book'. The main record is for the book 'Rise and shine, Mariko-chan!' by Chiyoko Tomioka Yoshiharu Tsuchida, published in 1992. Below the title, there is a 'Check holdings' button. A 'Get It' button is also visible. The record indicates that the search did not match any physical resource in the library and provides a link to request the resource from other libraries. A pop-up window titled 'Institutions' is open, showing the user's institution as 'Alma University' and a list of other institutions, including 'University of Knowledge', which is marked as 'Available'.

Rise and shine, Mariko-chan!
Chiyoko Tomioka Yoshiharu Tsuchida '1992

Book

Check holdings

Get It Details

Alma University More(1)

Your search did not match any physical resource in the library.
Use the link/s below in order to request the resource from other libraries

Illad(1 month)

Institutions X

My Institution:
Alma University

Other Institutions:
University of Knowledge Available

Book

Direct Requesting

The screenshot shows the 'Direct Requesting' interface for a book. At the top, the book title 'Rise and shine, Mariko-chan!' is displayed, followed by the author 'Chiyoko Tomioka Yoshiharu Tsuchida 1992'. Below this, there is a 'Check holdings' button. The 'Get It' tab is selected, showing the 'University of Knowledge' as the source. The 'Request Options' are 'Request' and 'Digitization'. The 'Location' is 'Main Library General QH 305 C6 v.58 1993'. The 'Availability' is '(1 copy, 1 available)'. A table below shows the request details for one record. The table has columns for Barcode, Type, Policy, Description, and Status. The data row shows Barcode '34607-10', Type 'Book', Policy '4 Week', Description (empty), and Status 'Item in place'. Two blue arrows point to the 'Request' link and the 'Item in place' status.

☆ **Rise and shine, Mariko-chan!**
Chiyoko Tomioka Yoshiharu Tsuchida 1992

● Check holdings

[Get It](#) [Details](#)

University of Knowledge More(1) Actions 📄 ✕

Request Options: [Request](#) | [Digitization](#)

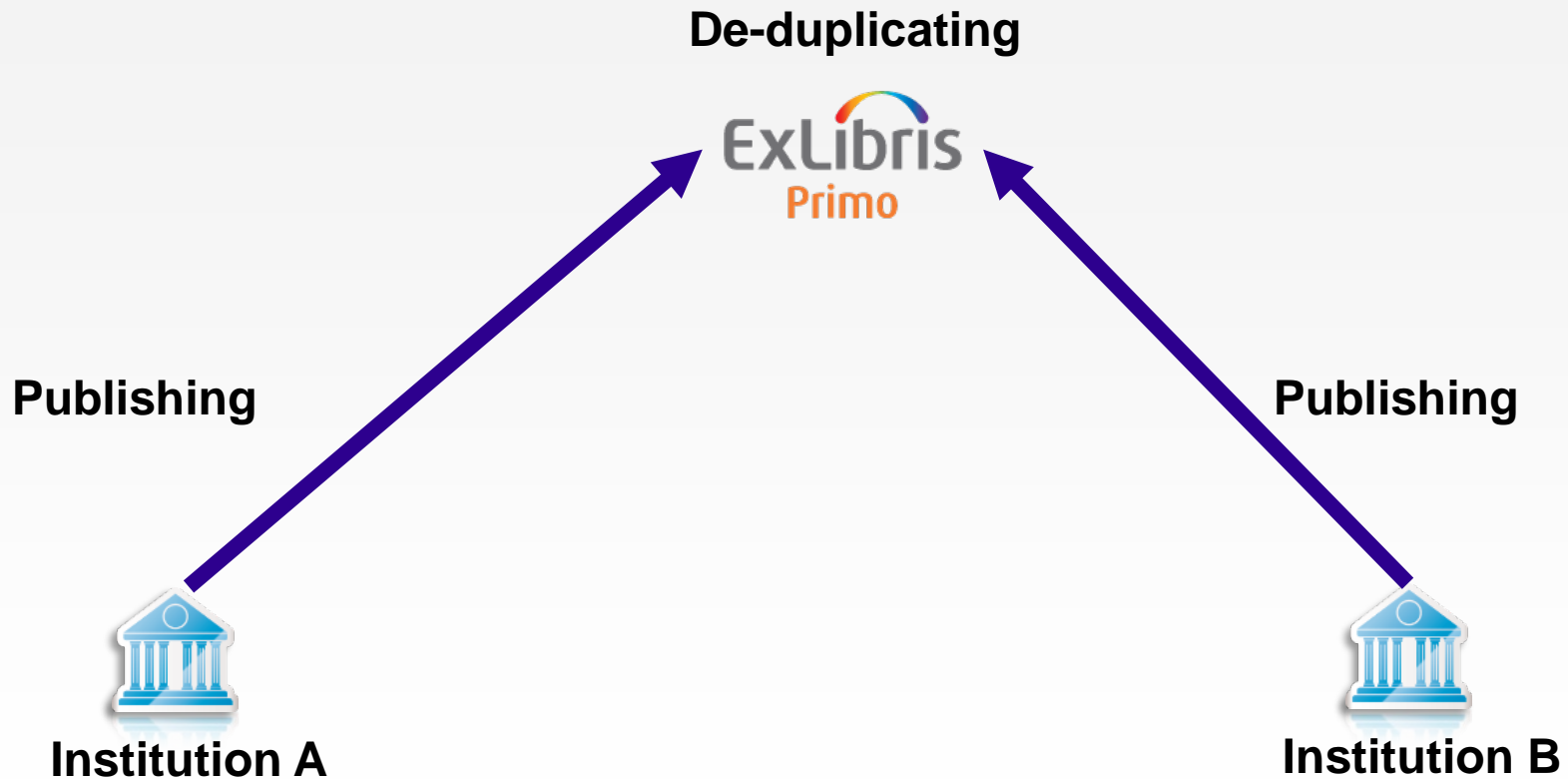
Location: Main Library General QH 305 C6 v.58 1993 [Hide Details](#)

Availability: (1 copy, 1 available)

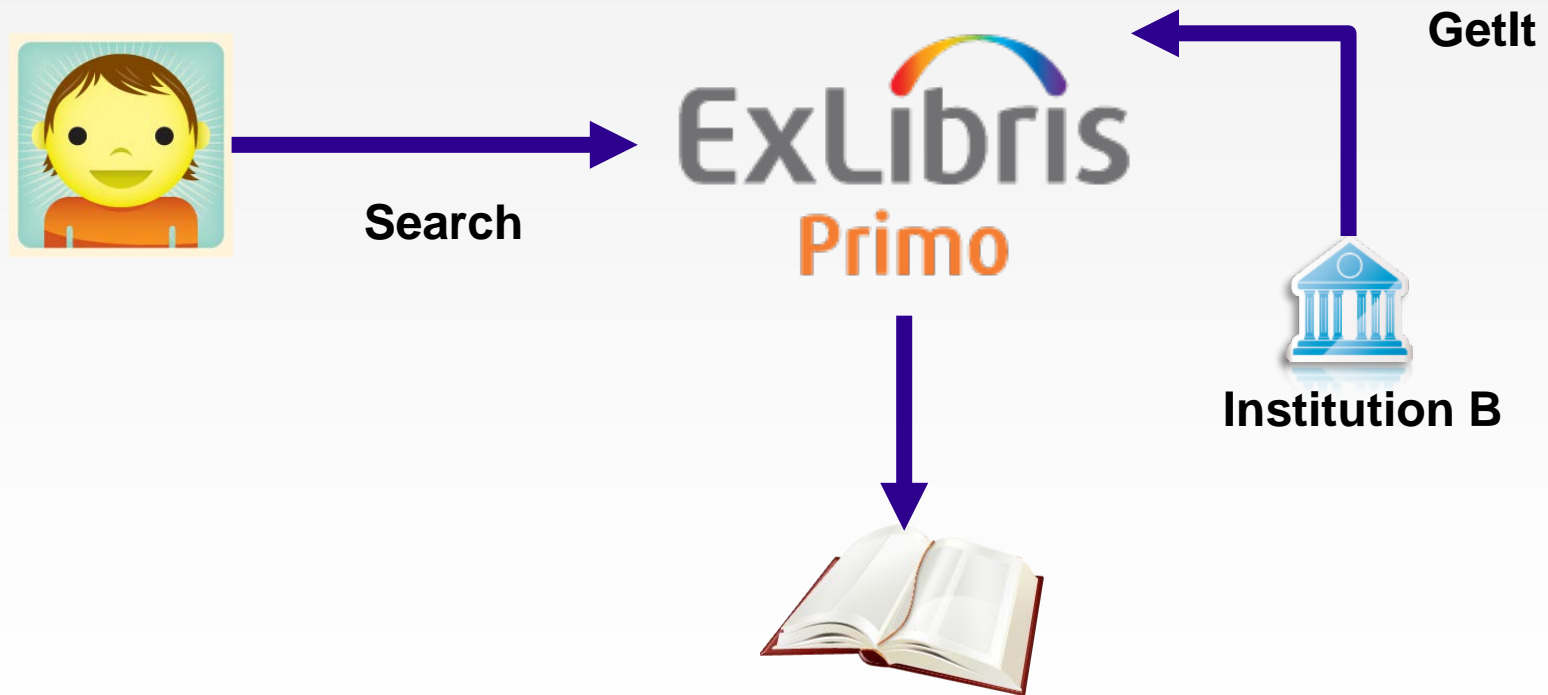
1 - 1 of 1 Records

Barcode	Type	Policy	Description	Status
34607-10	Book	4 Week		Item in place

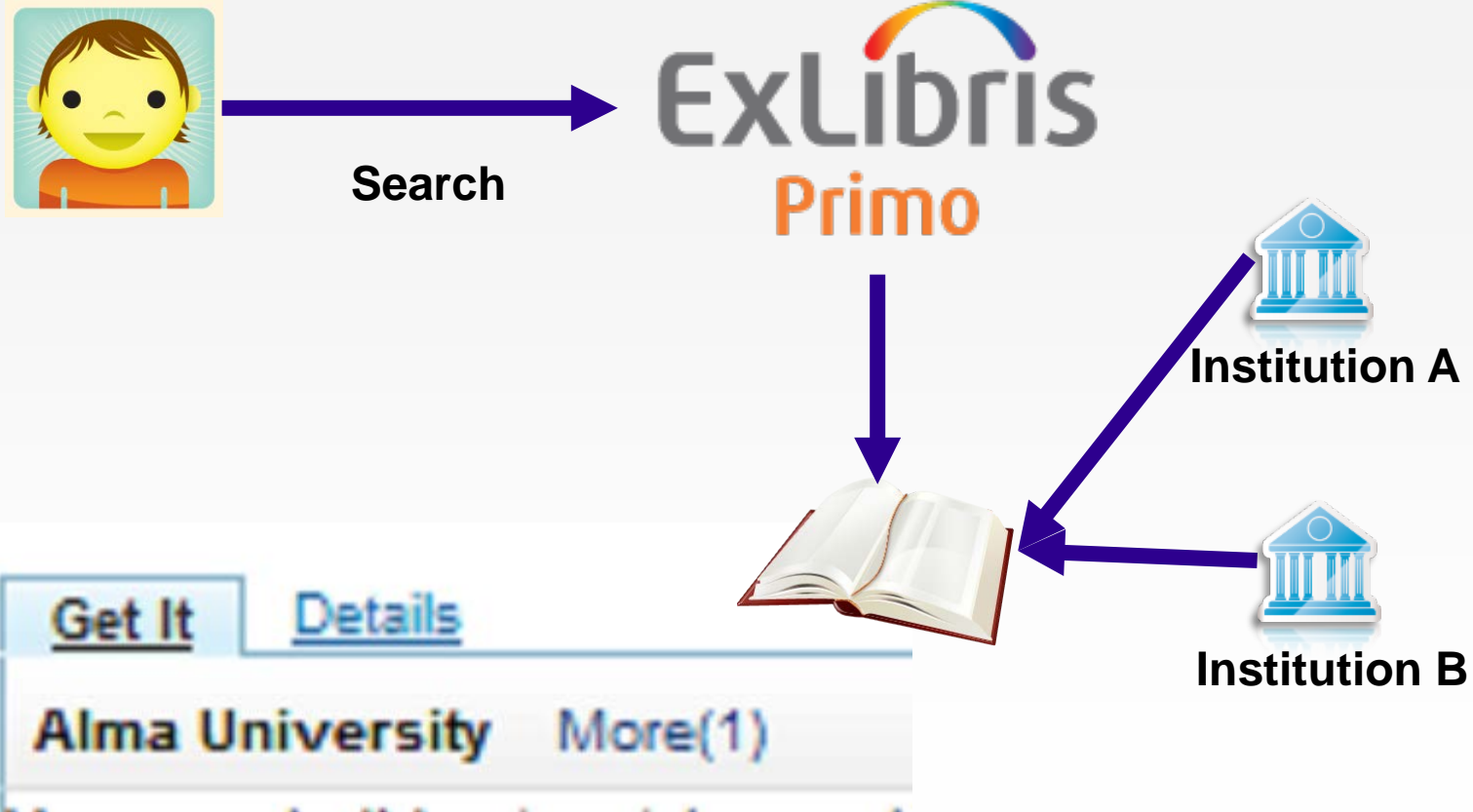
Direct Requesting – What Actually Happened ?



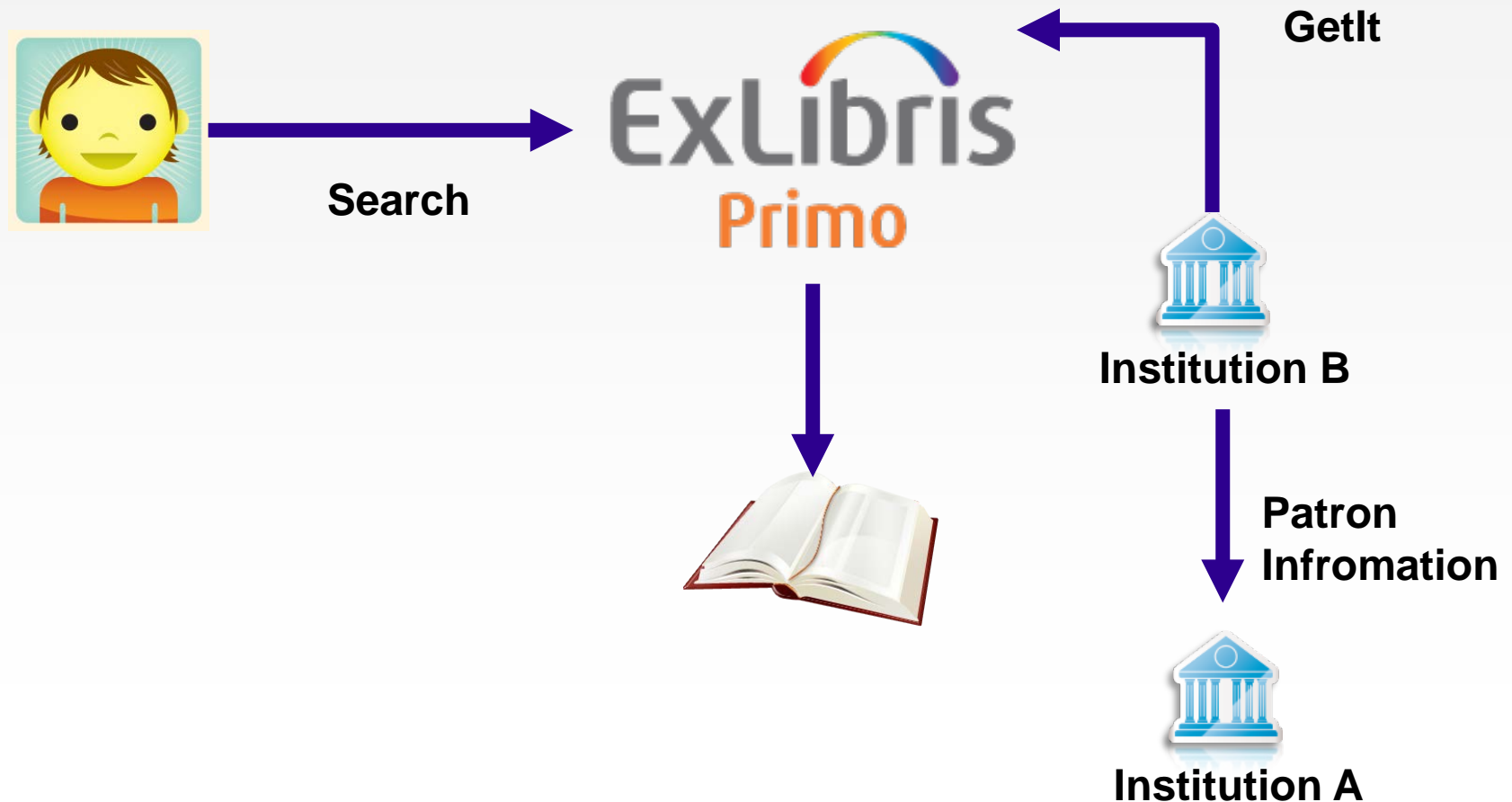
Direct Requesting – What Actually Happened ?



Direct Requesting – What Actually Happened ?

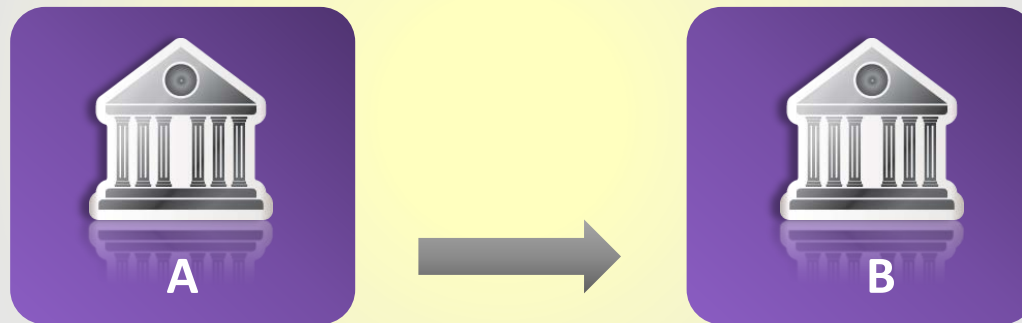


Direct Requesting – What Actually Happened ?



Joint Library Card

Patron is able to view Library Card from a number of institutions (if there is a shared PDS)



Joint Library Card

e-Shelf

Queries

My Account

Open University

Alma University

Loans (5)

Requests (9)

Fine & Fees (1)

Blocks & Messages

Personal Settings

University of Knowledge

List of Active Loans

Renew All

Renew Selected

#	Title	Author	Due Date	Due Hour	Potential Fine	Location	Status
1	<input type="checkbox"/> Exultate omnes ; Beata es, Virgo Maria; and, Quae est ista : three motets for 12 voices /	Ugolini, Vincenzo,	07/08/2014	18:48		Education Library	Renewable
2	<input type="checkbox"/> Values immediate and contributory, and their interrelation.	Picard, Maurice.	07/03/2014	21:00		Main Library	Renewable
3	<input type="checkbox"/> O'er oceans and continents with the setting sun, 4th series : Italy, Austria, Bavaria, Switzerl	Blatter, Geo. J.	06/12/2014	08:58		Main Library	Renewable
4	<input type="checkbox"/> The railway man /	Lomax, Eric,	05/20/2014	20:00	11.50 USD	Main Library	Renewable
5	<input type="checkbox"/> Dealing with climate change : policies and measures in IEA member countries /		05/20/2014	20:00	12.25 USD	Main Library	Renewable

Fulfillment Network Attributes

- The resource owning library is the patron's service provider. The patron directly requests the resource from the remote member institution.
- The resource may be picked up at the resource owning institution.
- The resource owning library directly manages all aspects of the loan cycle with the requesting patron, including
 - Loan management (overdue, lost, renew etc.)
 - Fine/fee related issues
- The request is direct with the supplier – there is no process to distribute the requests to specific lenders based on institution or network considerations.

Fulfillment Network



Rules define how the patron will be copied over :

- **User group**
- **Resource Sharing Library**
- **Expiry Date**
- **Purge Date**



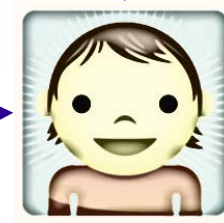
Institution B

Institution A



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Alma

ExLibris
Alma



ExLibris

Fulfillment Network – User Value

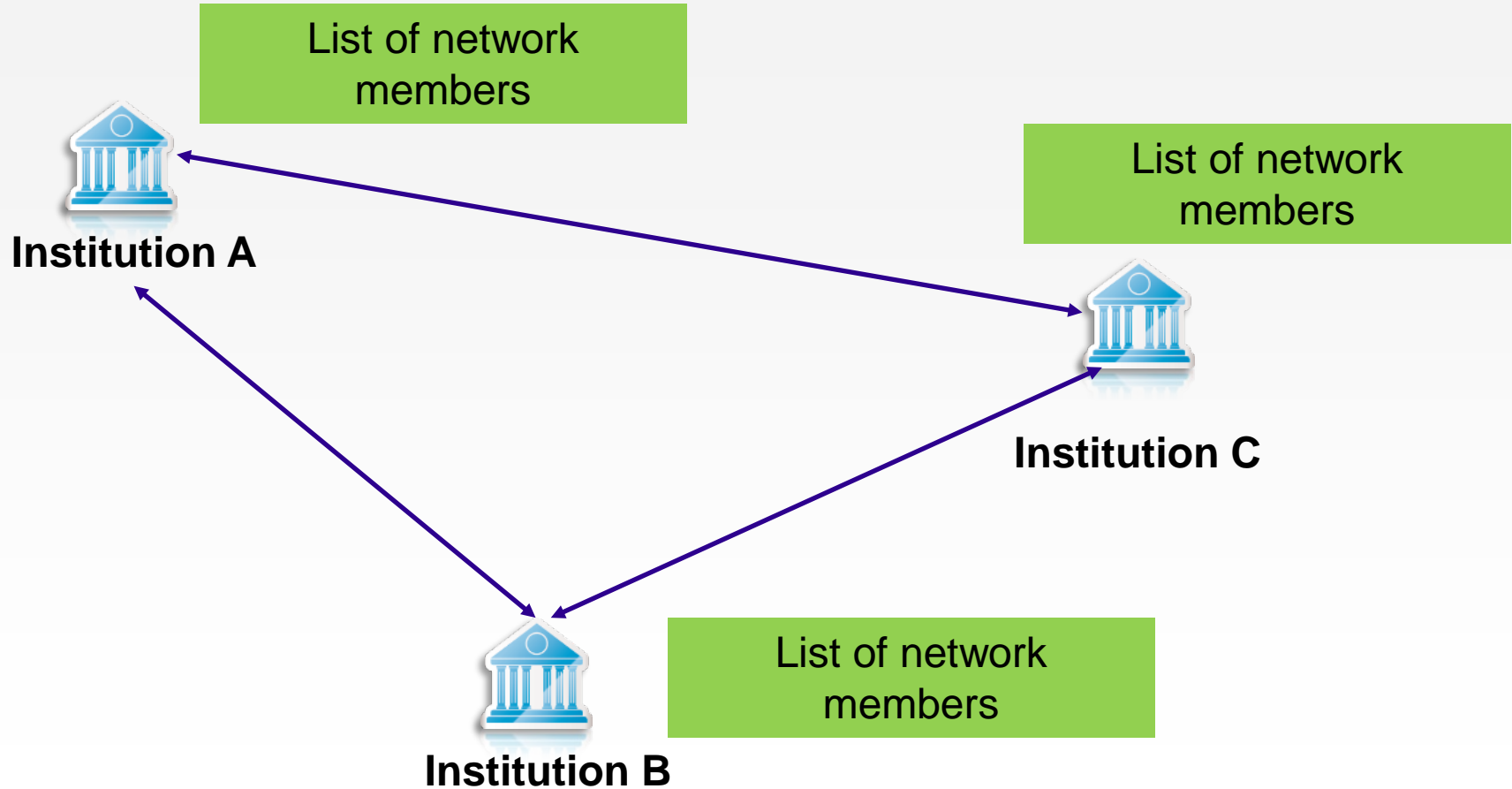
- The Fulfillment Network eases the library involvement in terms of configuration, maintenance of supplier lists and in terms of staff mediation of the requests.
- The responsibility for obtaining the resources is levied on to the end user, leaving library staff out of this process.

Fulfillment Network – Considerations

- Patron information may be freely shared between the institutions of the network.
- Institutions can agree on the policies by which their resources will be lent to different patron types of other institutions
- Institutions want to implement a shared blocking policy.
- The member institutions inventory is discoverable by patrons of all network members.

Fulfillment Network Models – No Shared NZ

Configuration Option II:



Roadmap Plans

- Return anywhere
- Transit between institutions
- Loan anywhere
- Rota Management and request promotion

THANK YOU!

moshe.shechter@exlibrisgroup.com

משתמשי אקס ליבריס - ישראל
Ex Libris Users Group - Israel



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