



Advanced Resource Sharing

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ExLibris
a ProQuest Company

■ Introductions

- Moshe Shechter
Alma Product Manager

With Ex Libris for 14 years. After a couple of years on the Aleph development team, I joined the Alma team in 2010 as business analyst and later as product manager.

My focus is in Fulfillment, Resource Sharing, User Management and Integrations.

Objectives and Target Audience

- By the end of this sessions you will be familiar with advanced options for configuring resource sharing workflows
- Session Target Audience:
 - Resource sharing administrators, familiar with resource sharing in Alma

Agenda

- 1 Resource Sharing Libraries (and Partners)
- 2 Item Creation Rules
- 3 Automation Options
- 4 Digital Delivery
- 5 Copyright Management
- 6 Recalls
- 7 Form Customization
- 8 Workflow Profiles
- 9 Next Steps, Support Resources and Survey



Resource Sharing Libraries (and Partners)

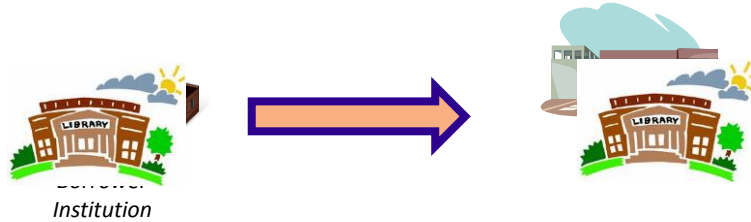
The Partners

ExLibris
Alma
*Borrower
Institution*



ExLibris
Alma
*Lender
Institution*

The Partners



Resource Sharing Partner

Partner Code: CONG Partner Name: CONG

General Information Contact Information Parameters Notes

Partner Information

Code * CONG Name * CONG

Profile Type * ISO Status Active

System Type * Alma

Average Supply Time 0 Delivery Delay 0

Currency

Supports Borrowing ☒ Borrowing Workflow Summit 3 - Borrowing

Supports Lending ☒ Lending Workflow Summit 3 - Lending

Locate Profile 01ALLIANCE_CONG Institution Code 01ALLIANCE_CONG

Holding Code

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The Partners

Resource Sharing Partner

Partner Code: UID_LAW Partner Name: UID_LAW

General Information Contact Information Parameters Notes

Partner Information

Code * UID_LAW Name * UID_LAW

Profile Type * ISO Status Active

System Type * Alma Local Status Active

Average Supply Time 0 Delivery Delay 0

Currency

Supports Borrowing ☒ Borrowing Workflow Summit 3 - Borrowing

Supports Lending ☒ Lending Workflow Summit 3 - Lending

Locate Profile 01ALLIANCE_UID Institution Code 01ALLIANCE_UID

Holding Code Law

Resource Sharing Partner

Partner Code: UID_MAIN Partner Name: UID_MAIN

General Information Contact Information Parameters Notes

Partner Information

Code * UID_MAIN Name * UID_MAIN

Profile Type * ISO Status Active

System Type * Alma Local Status Active

Average Supply Time 0 Delivery Delay 0

Currency

Supports Borrowing ☒ Borrowing Workflow Summit 3 - Borrowing

Supports Lending ☒ Lending Workflow Summit 3 - Lending

Locate Profile 01ALLIANCE_UID Institution Code 01ALLIANCE_UID

Holding Code main

Mapping Table Rows

	Enabled	partnerHoldingCode	holdingValue
1	<input checked="" type="checkbox"/>	main	main
2	<input checked="" type="checkbox"/>	main	IMTC
3	<input checked="" type="checkbox"/>	main	womens
4	<input checked="" type="checkbox"/>	main	herbarium

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The Partners

The diagram illustrates the relationship between different types of partners in a library system. It features three main components:

- Borrower Institution:** Represented by an icon of a large building with a dome and a clock tower.
- Lender:** Represented by an icon of a modern building with a glass facade.
- Department:** Represented by an icon of a building with a clock tower and a clock face.

Two screenshots of the "Resource Sharing Partner" form are shown, illustrating the configuration for different partner types:

- Top Screenshot (Borrower Institution):** The form shows the "Partner Code" as "OIT_KFLS" and the "Partner Name" as "OIT_KFLS". The "Profile Type" is set to "ISO". The "System Type" is set to "Alma". The "Average Supply Time" is set to "0". The "Currency" is set to "USD". The "Supports Borrowing" and "Supports Lending" checkboxes are both checked. The "Locate Profile" field is set to "BIBLIOTHECA_OIT". The "Holding Code" is set to "KFLS". The "Borrowing Workflow" is set to "Summit 3 - Borrowing". The "Lending Workflow" is set to "Summit 3 - Lending". The "Institution Code" is set to "BIBLIOTHECA_OIT".
- Bottom Screenshot (Lender):** The form shows the "Partner Code" as "OIT_WLS" and the "Partner Name" as "OIT_WLS". The "Profile Type" is set to "ISO". The "System Type" is set to "Alma". The "Average Supply Time" is set to "0". The "Currency" is set to "USD". The "Supports Borrowing" and "Supports Lending" checkboxes are both checked. The "Locate Profile" field is set to "BIBLIOTHECA_OIT". The "Holding Code" is set to "WLS". The "Borrowing Workflow" is set to "Summit 3 - Borrowing". The "Lending Workflow" is set to "Summit 3 - Lending". The "Institution Code" is set to "BIBLIOTHECA_OIT".

Arrows indicate the flow of information from the "Department" to the "Borrower Institution" and "Lender" forms.

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The Partners (Holding Code)

Locate Profile Details

Name	Description
Z39.50	Z39.50

General Information

Enrich with holdings ☒

Holding field * 852

Find resource * CAPITA (BLConM21)

Credentials

subfield * a

CAPITA (BLConM21)

Test Connection

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The Libraries

ExLibris Alma

Tasks Analytics Currently at: Main Library - Default Circ...

Organizational Units Relations Setup

You are configuring: Resource Sharing Library

Library Relations

Relation Type: All

Add Relation

	Name	Description	Deliver To	Circulate For	Supply From	No
1	Main Library	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-
2	All	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	-

Resource Sharing Library

Main Library

Law Library

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The Libraries

1

Argynis on organization : predictions/prescriptions.
 Book (Book - Physical) By Argynis, Chris. (New York : AMACOM American Management Association [1976].)
 Language: English Record number: KLF00000136
 Availability: Physical version at GFU: LSTACKS: 658.403 A695a (1 copy, 1 available)
 Physical version at MAIN: main: 658.403 A695a (1 copy, 0 available)

MMS Debug Screen | Get | Resource Sharing Lending Requests Task List

Limit results to:

Status: Being Processed (1)

Request Printed: No (1)

Request Reported: No (1)

Active Partner: Birmingham University (1)

Update Date: Today (1)

Assigned to Me | Unassigned | Assigned to Others

Activity Status: Active

Add | Refresh

Search limited to: Creation Date: Today

Select All

1 [X] Argynis on organization : predictions/prescriptions.
 Book (Book - Physical) By Argynis, Chris. (New York : AMACOM American Management Association [1976].)
 External Identifier: 1368-0472 Requested Media: Any
 Availability: Physical version at MAIN: main: 658.403 A695a (1 copy, 0 available)
 Request Status: Being Processed Resource Locate Status: Resource Located
 Request Printed: No Request Reported: No
 Creation Date: 14/02/2017 Update Date: 14/02/2017
 Level: Resource Shared
 Alert: Citation Move Required In Process
 Edit | Manage Fulfillment Options | Duplicate | Reassign | Search | Detach from MMS | Reject | Release Assign | Print Slip | Ship non-returnable |

Manage Resource Options

Title: Argynis on organization : predictions/prescriptions Author: Argynis, Chris, 1923-

Electronic Version: No records were found.

Digital Version: No records were found.

Physical Version: 1-1 of 1 Records Columns

Library	Location	Call Number	No. of Items	Available	Action
1 Main Library	main	658.403 A695a	1	0	

1-1 of 1 Records Columns

Argynis on organization : predictions/prescriptions.
 By: 14/02/2017/2017 Created by: [redacted] Request Date: 14/02/2017
 Place in Queue: [redacted] Requested Media: LIT00
 Call Number: 658.403 A695a Resource: LIT00
 Managed By Library: [redacted] Requested By Dept: Argynis Desk
 Request Date: 14/02/2017 Requested Date: 14/02/2017 Expiration Date: 21/02/2017
 Request Type: Physical External Identifier: 1368-0472/00000136
 View Audit Trail | Edit | Cancel | 14/02/2017/2017 | 14/02/2017/2017 | Print Slip | View MMS is shared

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The Libraries (Policies)

Edit Fulfillment Unit

You are configuring: Training and Integration

Name: Regular

Fulfillment Unit Details | **Fulfillment Unit Locations** | Fulfillment Unit Rules

Rule Type: Request

Filter: All

[Add Rule](#)

	Enabled	Move Up	Move Down	Rule Name
1				RR TEST
2				Staff 6 week Staff Regular
3				staff (high)
4				under - low
5				ALL
6				No RS
7				test for no request
8				Faculty Requesting
9				Lost not requestable
10				Low Priority 2 week Low Priority Regular
11				High Priority 4 week High Priority Regular
12				Not Loanable

[Add Rule](#)

Default Rule
Default request rule

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The Libraries (Policies)

You are configuring: Training and Integration

Please Confirm Terms of Use Setup

Terms Of Use | Default terms of use

Is Requestable	Is Requestable	-
Pickup Locations	Anywhere	Default value for Pickup - Anywhere
Hold Shelf Period	7 day Hold Shelf	Default value for HoldShelfPeriod
Is Digitizeable	Not Digitizable	-
Is Requestable for Resource Sharing	Not Requestable For Resource Sharing	-
Request Priority	Medium	Medium
On Shelf Request Policy	Use fulfillment unit definition	Use fulfillment unit definition
Personal delivery	Personal Delivery - All	Deliver items to a home or an office address
Personal delivery fee	Personal Delivery Fee - No Fee	Personal delivery is not charged with a fee
Automatically convert to resource sharing	Do not convert to resource sharing	Do not convert to resource sharing
Digitization Fee per Digitization	No Fee	Digitization request is not charged with a fee
Digitization Fee per Page	No Fee	Digitization request is not charged with a fee per page

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The Libraries (Policies)

Manage Resource Options Cancel Remove Alerts Place Request

Some of the existing physical inventory may not be used for fulfilling resource sharing requests due to library policies

Title: Argyris on organization : predictions/prescriptions. Author: Argyris, Chris, 1923-
Alerts: .

Electronic Services

No records were found.

Digital Services

No records were found.

Physical Services

1 - 1 of 1 Records Columns Tools

Library	Location	Call Number	No. of Items	Available	Actions
1 Main Library	Main	GSB A03 A035a	1	0	

Create Request

No items available for the request due to policy.

Create Request

Title Argyris on organization : predictions/prescriptions.
Institution Training and Integration
Request Type Ship physically
Note
To

Item Creation Rules



Item Creation Rules

Configuration

You are configuring: Resource Sharing Library

Fulfillment Configuration

Library

Opening Hours Relationships Transit Time Circulation Desks SIP2 Bin Configuration Temporary Item Creation Rules

Temporary Item Creation Rule

Temporary Item Creation

Name *

Description

Created By Ex Libris

Updated By Ex Libris

Input Parameters

No records were found.

Name Operator Possible Value> Value

Circulation Desk

Days Until Due Date

Resource Sharing Partner

Borrowing Resource Sharing R

ILL Loan - Long

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Item Creation Rules

University of Idaho Alma QA

Tasks Analytics Currently at: Resource Sharing Library - ...

Temporary Item Creation Rules

You are configuring: UI Library

Rules List

Filter All

Add Rule

Enabled	Move Up	Move Down	Rule Name	Description
Temporary Item Creation			Summit Long Loan (57 days)	
			Summit Long Loan (57 days)	
			Created By Implementer, Ex Libris	Created On 01/13/2015
			Updated By Implementer, Ex Libris	Updated On 01/22/2015

Input Parameters

Name	Operator	Value
1 Days Until Due Date	Greater than	30

Output Parameters

Location Item Policy Summit3 Long Loan ussumit3l

Temporary Item Creation

Name Summit Short Loan (25 days)

Description Summit Short Loan (25 days)

Created By Implementer, Ex Libris

Updated By Implementer, Ex Libris

Created On 01/13/2015

Updated On 01/22/2015

Input Parameters

Name	Operator	Value
1 Days Until Due Date	Less than	30

Output Parameters

Location Item Policy Summit3 Short Loan ussumit3s

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Item Creation Rules

Edit Fulfillment Unit

You are configuring: UI Library

Name Summit 3

Fulfillment Unit Details | **Fulfillment Unit Locations** | Fulfillment Unit Rules

Physical Location Type

[Attach existing location](#) [Attach New Location](#)

Code	Name
1 slong3	Summit3 Long Loan
2 sshort3	Summit3 Short Loan

Edit Fulfillment Unit

You are configuring: UI Library

Name Summit 3 Code SUMMIT3

Fulfillment Unit Details | **Fulfillment Unit Locations** | Fulfillment Unit Rules

Rule Type Loan

Filter: All

[Add Rule](#)

Enabled	Move Up	Move Down	Rule Name	Description	Output
<input checked="" type="checkbox"/>			Summit Long Loan	Summit Long Loan	0 week Fac/Staff/Grad/Undergrad Summit Long Loan
<input checked="" type="checkbox"/>			Summit Short Loan	Summit Short Loan	6 day Fac/Staff/Grad/Undergrad Summit Short Loan

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Item Creation Rules

Fulfillment Unit Rules Editor [Back](#)

Name Summit 3 Code SUMMIT3

Fulfillment Unit Rules Editor

Name Summit Long Loan
Description Summit Long Loan
Created By Implementer, Ex Libris
Updated By Implementer, Ex Libris
Created On 01/13/2015
Updated On 01/13/2015

Input Parameters

Name	Operator	Value
1 Location	=	Summit3 Long Loan

Output Parameters

Terms of Use 6 week
Fac/Staff/Grad/Undergrad
Summit Long Loan

Fulfillment Unit Rules Editor

Name Summit 3 Code SUMMIT3

Fulfillment Unit Rules Editor

Name Summit Short Loan
Description Summit Short Loan
Created By Implementer, Ex Libris
Updated By Implementer, Ex Libris
Created On 01/13/2015
Updated On 01/13/2015

Input Parameters

Name	Operator	Value
1 Location	=	Summit3 Short Loan

Output Parameters

Terms of Use 6 day
Fac/Staff/Grad/Undergrad
Summit Short Loan

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Automation Options



Automation Options – On the Resource Sharing Library

Resource Sharing Information

Is resource sharing library ☒

Itemless ☐

Symbol

Borrowing Setup

Cancel request on locate failure ☒

Automatically activate locate profile ☒

Default location

Default pickup location

Lending Setup

Automatically locate resou

Reject request when locate fi

Reject request when requestable/available ite

Reject request when only electro

Ignore electronic resou

Automatic creat

Default locat

Audio CD

☆ **Bad**

Michael Jackson, 1958-2009. Quincy Jones, 1933-

● **Check holdings**

Find It

Details

More(1)

Resource Information:

Volume (one request per volume):

Delivery Information:

Pickup/delivery location: *

Comment:

Request

Cancel

Automation Options – Create Move Request

43	rs_auto_request_lending	fulfillment	true
44	rs_auto_request_lending_with_serials	fulfillment	false
45	rs_auto_request_lending_with_volume	fulfillment	false
46	rs_block_sending_requester_info	fulfillment	false
47	rs_borrower_copyright_management	fulfillment	false
48	rs_default_digitization_department	fulfillment	Digitization Department For Inst

☐ Select All

1 ☐ **An act pertaining to the inheritance of trust or restricted land on the Standing Rock Sioux Reservation, North Dakota and South Dakota.**
Book (Book - Physical) text; unmediated; volume By United States. ([Washington] : For sale by the Supt of Docs US Govt Print Off [1960])
 OCLC Number: 06655562
 Series: Public Law : 95-274.
 Subject: Indians of North America--Legal status, laws, etc. -- Standing Rock Indian Reservation (N.D. and S.D.) -- United States--Standing Rock Indian Reservation.
 External Identifier: 1/01ALLIANCE/SU003907 Requested Media: Any
 Availability: Physical version at main: **UUSDOC; GS 4.110:96-274** (1 copy, 0 available)
 Request Status: Being Processed Resource Locate Status: Resource Located
 Request Printed: No Request Reported: No
 Creation Date: 02/10/2017 Update Date: 02/10/2017
 Alerts: Citation Move Request In Process
[Edit](#) | [Manage Fulfillment Options](#) | [Duplicate](#) | [Reassign](#) | [Search](#) | [Detach from MMS](#) | [Reject](#) | [Print Slip](#) | [Ship non-returnable](#) | [Ship Item](#) | [General Message](#) | [More details](#)

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Automation Options – Managing Self Ownership

Discovery Interface Display Logic

Add Rule

Institution Rules

Remove Selected Deactivate Selected

	Active	Move Up	Move Down	Rule Description
1	<input checked="" type="checkbox"/>			For user groups idguest, iddeptstud, idsummit, lawfac, lawstaff, lawstud: Hide service General Electronic Service with Service = ILLiad
2	<input checked="" type="checkbox"/>			For user groups idguest, iddeptstud: Hide service Resource Sharing Request with Resource Sharing System = Alma
3	<input checked="" type="checkbox"/>			For user groups lib, attorneys, out, train, isl, ady in Town, isl, Court, isl, Guest, isl, Inter-Library, isl, Judge, isl, Law Faculty, isl, Law Student, OCLC MAILGATOR, subentry, attac-in, uttac-o, idgrad-m, idgrad-o, idquest, idll, idll-o, null, idstaff-m, idstaff-o, idsummit, idundergrad-m, idundergrad-o: Hide service Resource Sharing Request with Resource Sharing System = InterLibrary Loan Request for U College of Law Community
4	<input checked="" type="checkbox"/>			Hide service Resource Sharing Request with Resource Sharing System = ILLiad
5	<input checked="" type="checkbox"/>			Hide service Resource Sharing Request with Availability by the institution = true

Sending Borrowing Request Rules

Sending Borrowing Request Rules

Name Do not send self owned

Description

Created By Implementer, Ex Libris

Updated By Implementer, Ex Libris

Created On 02/14/2017

Updated On 02/14/2017

Input Parameters

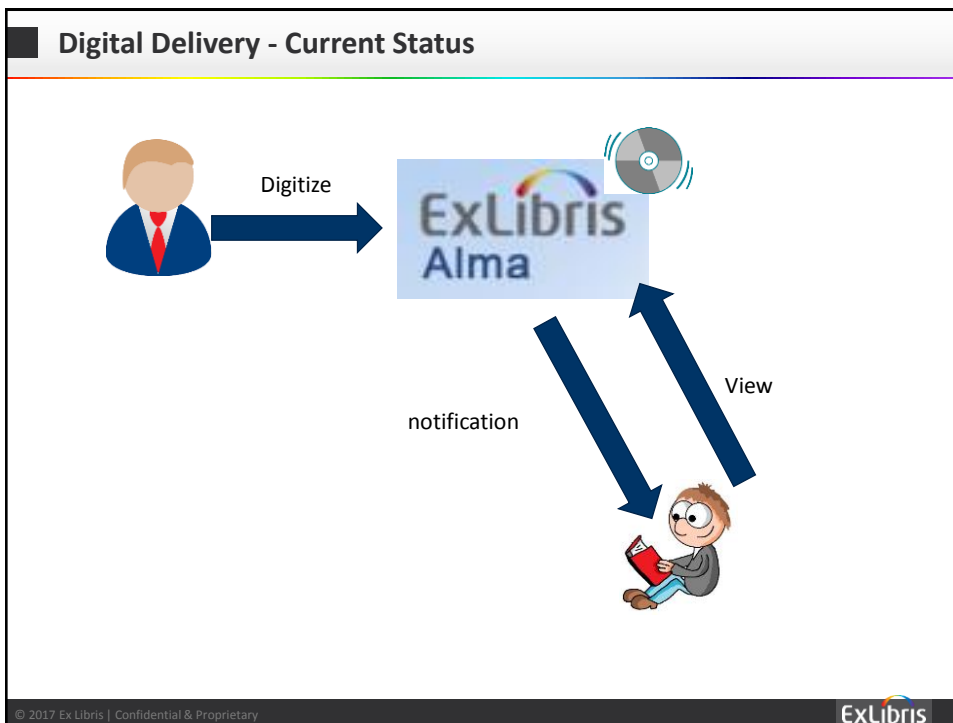
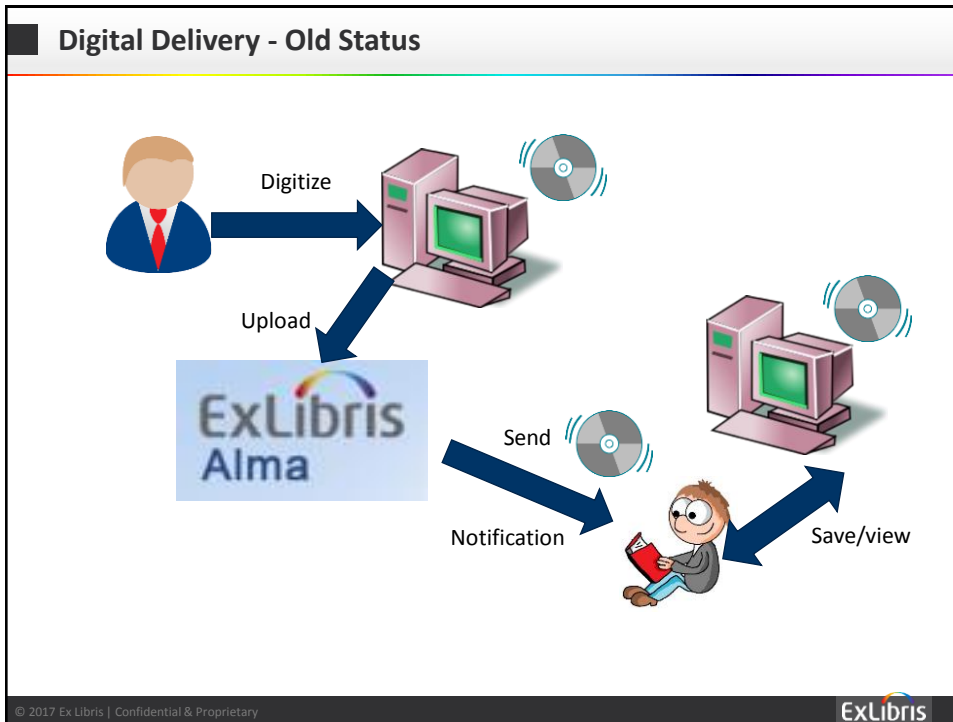
Name	Operator	Value
1 Self Ownership	=	True

Output Parameters

Name	Result
Send Request	False

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Digital Delivery – The Benefits

- No use of attachments
- Resource is password protected
- Number of accesses is limited
- Resource is temporarily in the Alma cloud, and automatically removed after time
- Works for partners using Alma !

Digital Delivery

Digital Fulfillment

Digitization Departments Digitization Profile Rules Access Rights Copyright Declaration Electronic Document Delivery Rules

Digitization Workflow Rule Editor		
Name	RS BY LINK (2 views)	
Description	-	
Created By	Ex Libris Implementer	Created On: 13/02/2017
Updated By	Ex Libris Implementer	Updated On: 13/02/2017
Input Parameters		
Name	Operator	Value
1 Required Type		incoming resource sharing digitization request
Workflow Setup		
Upstream Content Management		
Select digitization target	Document delivery - link	
Maximum views	2	
Approval/Copyright Clearance Processing		
No Approval		
No Copyright clearance		

Digital Delivery

Resource Sharing Borrowing Request

General Information Audit Rota Parameters General

Resource Information

Title * History of the Cold War.

Author * Fontaine, André.

Author Initials

Edition [1st American ed.]

ISBN

LCCN 67019180 //r335

OCLC Number

Other Standard ID

Barcode

Remote Record ID

Publisher Pantheon Books

Publication Date [1968-69]

Place of Publication New York.

Additional Person Name

Source

Series Title Number

Call Number D421

Note Translation of Histoire de la guerre froide.

Volume 1

Part

Chapter

Pages

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2 ☐ **History of the Cold War.**
Book (Book - Physical) By Fontaine, André, (New York, Pantheon Books [1968-69])
 LCCN: 67019180 //r335
 Subject: History, Modern--20th century. -- Cold War
 External Identifier: 1/TRINTEGRATION009056 Requested Media: Any
Availability: Physical version at **MAIN: main; D421 .F613 1968 v.1**
 Request Status: Being Processed Resource Locate Status: Resource Located
 Request Printed: No Request Reported: No
 Creation Date: 14/02/2017 Update Date: 14/02/2017
 Level of Service: Priority (Local)
Alerts: Citation Digitization Request In Process
[Edit](#) | [Manage Fulfillment Options](#) | [Duplicate](#) | [Reassign](#) | [Search](#) | [Detach from MMS](#) | [Reject](#) | [Release Assign](#) | [Print Slip](#) | [Ship non-returnable](#) |

Scan In Items

Scan In Items Change Item Information

Automatically print slip ☐ Yes ☒ No

Register in-house use ☒

Scan item barcode * OK [Create Item](#)

Scan request ID OK

Title	Activate	Destination	Barcode	Request/Process Type	Requester	Req
1 History of the Cold War.		Digitization	98074	Ship digitally	-	-

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Attachments

Request ID -

Title History of the Cold War.

Digitization Type - Partial

Requester Health & Science

File name

File Type

File Size

File Attached By

File Attached On

File URL

File Notes

File Upload Status

summer 16 156.JPG

Image/png

2012 110

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14/02/2017 02:38:49 CDT

Pending

Quick Add

File name

summer 16 156.JPG

URL

Notes

Add Attachment

The maximum attachment size is 10 MB

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Implementer

Ex Libris Implementer

Your request to create a digital version of the following material has been completed.

Title:

To download the resource:

For local/LDAP users [click here](#).

For SAML users (add idpCode if needed) [click here](#).

For CAS users [click here](#).

For your information, the maximum number of views of the resource is .

Sincerely

Circulation Department

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Ex Libris Alma

Ex Libris Alma

Maximum number of views exceeded

10

document_delivery_cleanup_days

fulfillment

30

Ex Libris Alma

Download completed successfully

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Copyright Management



Resource Sharing Copyright Management

- There is an option in Alma to define copyright rules for resource sharing borrowing requests
- These rules will cause the system to block borrowing requests from being sent to the lenders, until a copyright approval is indicated by the resource sharing library staff

Set the System to Control Copyright for Resource Sharing

- In order to set the system to manage copyright for borrowing requests, use the Other Settings menu in the Fulfillment Configuration
- The `rs_borrower_copyright_management` parameter should be set to true

33	results_best_location_enable	fulfillment	true
34	return_lost_loan_from_self_check	fulfillment	true
35	rs_auto_request_lending	fulfillment	true
36	rs_auto_request_lending_with_volume_issue	fulfillment	true
37	rs_borrower_copyright_management	fulfillment	true
38	rs_default_digitization_department	fulfillment	

Set the Rules

- Use the Digitization Profile Rules to define copyright management rules for resource sharing borrowing requests

The screenshot shows the Alma Configuration interface. At the top, there's a navigation bar with 'Alma' and a search bar. Below it, the 'Configuration' section is active, showing 'You are configuring: Training and Integration'. The main content area is titled 'Fulfillment Configuration' and contains several expandable sections: Library, Physical Locations, Physical Fulfillment, Patron Configurations, Digital Fulfillment, and Courses. The 'Digital Fulfillment' section is expanded, showing links for 'Digitization Departments', 'Digitization Profile Rules' (highlighted with a red box), 'Access Rights', 'Copyright Declaration', and 'Electronic Document Delivery Rules'.

Set the Rules

- Defining a rule as below means:
 - If request is a borrowing resource sharing request**AND**
 - The same resource (title/isbn) has been requested more than 5 times**THEN**
 - Copyright clearance is required

The screenshot shows the 'Alma' interface with the 'Digitization Workflow Setup' section. The 'Digitization Workflow Rule Editor' is open, showing a rule named 'Resource Sharing Rule'. The rule is defined by two input parameters:

Name	Operator	Value	
1 Request Type		Borrowing resource sharing digitization request	Delete
2 Number Of Requests	Greater than	5	Delete

Below the input parameters, the 'Workflow Setup' section shows the 'Digitized Content Management' target set to 'Document delivery'. Under 'Approval/Copyright Clearance Processing', the 'Copyright clearance' checkbox is checked, while the 'Approval' checkbox is unchecked.

Set the Rules

- A default rule may be set up so that resource sharing requests are allowed with no restriction up to the 6th request

The screenshot shows the 'Alma' interface with the 'Digitization Workflow Setup' section. The 'Digitization Workflow Rule Editor' is open, showing a rule named 'Default resource sharing rule'. The rule is defined by two input parameters:

Name	Operator	Value	
1 Request Type	=	Borrowing resource sharing digitization request	Delete
2 Number Of Requests	Less than	6	Delete

Below the input parameters, the 'Workflow Setup' section shows the 'Digitized Content Management' target set to 'Document delivery'. Under 'Approval/Copyright Clearance Processing', both the 'Approval' and 'Copyright clearance' checkboxes are unchecked.

Request Status

- As a result of these rules, when the same title (title + isbn/issn) is requested for the first 5 times, **and** the request is for digital fulfillment
 - The request is processed for automatic or manual sending as configured
 - The Copyright Status is 'No Copyright Restrictions'

The screenshot shows the 'Request Attributes' form for a digital request. The 'Request Status' is set to 'Ready to be sent' and the 'Copyright Status' is 'No copyright restriction'. Other fields include 'Requested Format' as 'Digital', 'Requested Media' as 'Any', and 'Delivery Location' as 'Main Library'.

Request Status

- As a result of these rules, when the same title (title + isbn/issn) is requested for the 6th time, **and** the request is for digital fulfillment
 - The request gets a special status of 'Pending Approval'.
 - The Copyright Status is 'Copyright Not Approved'
- There is no Send option for this request
- The automatic send rules ignore requests with this status

The screenshot shows the 'Request Attributes' form for a digital request. The 'Request Status' is set to 'Pending Approval' and the 'Copyright Status' is 'Copyright not approved'. Other fields include 'Requested Format' as 'Digital', 'Requested Media' as 'Any', and 'Delivery Location' as 'Main Library'.

Request Status

- In order to be able to send the request, an operator must manually change the **copyright status** to 'Copyright Approved' or to 'No Copyright Restrictions'

Request Status

- Only then does the option to send show up

Request Status

- Note that the copyright status may also be calculated using the “Calculate Copyright Status” button
- Using this button triggers the digitization rules, and automatically updates the copyright status as per the rules.

The screenshot shows the 'Request Article' form. The 'Copyright Status' field is set to 'No copyright restriction'. A red box highlights the 'Calculate Copyright Status' button next to it. Other fields include 'Requester' (Ex Libris), 'Partner' (BLDS), 'Request Status' (Ready to be sent), 'Internal Identifier' (112030250000561), 'Requested Format' (Digital), 'Requested Media' (Any), 'Delivery Location' (Deliver to library), 'Requested Pickup Location' (Main Library), 'Shipping Cost' (0.00 USD), 'Agree to Copyright Terms' (checked), and 'Request Note'.

Copyright Status Communicated to Lender

- When the request is sent, a Copyright Compliance indicator on the ISO message indicates whether it was sent as Copyright Approved (CCG) or as No Copyright Restrictions (CCL)

```
<ItemId>
  <ItemType>2</ItemType>
  <Title>Polar research</Title>
  <PublicationDateOfComp xsi:nil="true" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"/>
  <AuthorOfArticle>Leif G. Anderson</AuthorOfArticle>
  <TitleOfArticle>Observing the Arctic Ocean carbon cycle in a changing environment</TitleOfArticle>
  <ISSN>1751-8369</ISSN>
</ItemId>
<RetryFlag>False</RetryFlag>
<ForwardFlag>False</ForwardFlag>
<CopyrightCompliance>CCG</CopyrightCompliance>
```

Copyright Status Communicated to Lender

- The lender will see the communicated status on the request form

The screenshot shows a web form with two main sections: 'Resource Information' and 'Request Attributes'. The 'Request Attributes' section contains several dropdown menus. The 'Copyright Status' dropdown at the bottom is highlighted with a red box and is set to 'Copyright approved'.

Field	Value
Article/Chapter Title	Observing the Arctic Ocean carbon cycle in a changing environment
Journal Title	Polar research
Author	Leif O. Anderson
Volume	
Author Initials	
Issue	
ISSN	1751-4309
LCCN	
OCLC Number	
Other Standard ID	
Barcode	
Remote Record ID	
DOI	
PMID	
Publisher	
Place of Publication	
Additional Person Name	
Source	
Series Title Number	
Note	
Chapter	
Pages	
Start Page	
End Page	
Publication Date	
Supplied To	Training Institution
Owner	Resource Sharing Library
Request Status	Created lending request
External identifier	URN:NTE:GRATION0006954
Format	Digital
Requested Media	Any
Copyright Status	Copyright approved

Copyright Status Communicated to Lender

- The copyright status is reportable in Analytics



Recalls



Recalls

Resource Sharing Lending Requests Task List

Being Processed Change Status Print Slip Report Print Slip

Limit results to:

Status Assigned to Me Unassigned Assigned to Others

Activity Status: Active Find

Add Refresh

Search limited to: Creation Date: Today

☐ Select All

1 ☐ **Hard Times / by Charles Dickens.**
Book (Book - Physical) By Dickens, Charles, (London : J M Dent & co 1907, 1912.)
 LCCN: a 10000494
 Series: Eyre's library (no. 292)
 External Identifier: 1/TRINTEGRATION0009058 Requested Media: Any
Availability: Physical version at MAIN: male: PZ3.D55 H (1 copy, 0 available)
 Physical version temporarily at RES_UNASSIGNED: PZ3.D55 H (1 copy, 0 available)
 Physical version temporarily at RES_SHARE: IN_RS_REQ: PZ3.D55 H (1 copy, 0 available)
 Barcode: 569
 Due Date: 15/02/2017
 Request Status: Shipped Physically Resource Location: Resource Located
 Request Printed: No Request Reported: No
 Creation Date: 15/02/2017 Update Date: 15/02/2017
 Level of Service: Priority (Local)
 Alerts: Citation Move Request Cancelled
 Citation Move Request Completed
 Citation Move Request In Progress
[Edit](#) | [Manage Fulfillment Options](#) | [Duplicate](#) | [Reassign](#) | [Checked In](#) | [Renew](#) | [Release/Assign](#) | [Print Slip](#) | [Ship non-returnable](#) | [Ship Item](#) | [General Message](#) | [More details](#)

Physical (1)

Resource Sharing Borrowing Requests Aut

Limit results to:

Status Activity Status: Active

Physically received by library (1) Add Refresh

☐ Select All

1 ☐ **Hard Times /**
Book By Dickens, Charles, (J M Dent & co 1907, 1912.)
 LCCN: a 10000494
 External Identifier: TRINTEGRATION0009058 Internal Identifier: 1906779710000561
 Request Status: Physically received by library Partner: Training Institution
 Requested Media: Any Requester: Ex Libris Implementer [A](#)
 Barcode: RS-TRINTEGRATION0009058
 Due date: 15/07/2017 Pickup At: Main Library
 Creation Date: 15/02/2017 Update Date: 15/02/2017
[Edit](#) | [Duplicate](#) | [Send](#) | [Send query to patron](#) | [Request renew](#) | [Receive](#) | [Recall](#) | [Return](#) | [View Local Resources](#) | [General Message](#) | [More details](#)

Recalls

Patron Services

Patron Ex Libris Implementer
ID: 382141
User group Staff
Active balance 149,902.00 USD Pay
[Edit Info](#) [Send Activity Report](#) [Send Loan Receipt](#) [Send Request](#) [Report](#) [Submit Request](#)

Notes User Notes (2)

User has 10 overdue item(s), 7 in this library.

On Hold Shelf Items
1 User has 2 item(s) waiting for pickup at Resource Sharing Library library

Loans Returns Requests

Item from another institution
Scan item barcode *

OK Create Item

Loan Display All

Renew Selected Renew All Change due date

#	Title	Due Date	Barcode	Call Number	Fine	Loan Date	Loan Status
1	Hard times /	19/07/2017 17:00:00 CDT	RS-TRINTEGRATION0000058	-	-	15/02/2017	Normal

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ExLibris

Recalls

Showing: 1 resource in the library (1/1) | Full text search (1/1)

Hard times
Charles Dickens 1812-1870, 1907, 1912
Checked out from UNASSIGNED location (PZ3.D55 H) and other locations

Book Get It Details Virtual Browse

Alma Cloud

Request Types: Request | Digitization | Click | GTBib | INNREACH | OCLC Navigator (6 weeks) | OCLC NRE | Pacific Northwest National Laboratory (4 weeks) | Relais ILL | Resource sharing request | Purchase request | RS request | Document delivery | Union Catalogue of Belgian Libraries | illad test

Location Resource Sharing Library Lending Resource Sharing Requests PZ3.D55 H Show Details

1 - 1 of 1 Records

Barcode	Type	Policy	Description	Status
569	Book	6 Week		On ILL process until 19/07/2017



Hard times
Charles Dickens 1812-1870, 1907, 1912
Checked out from UNASSIGNED location (PZ3.D55 H) and other locations

Get It Details Virtual Browse

Alma Cloud

Details of title you requested:

Material Type:

Terms of Use:

Pickup Location: * Graduate Library

Not Needed After:

Comment:

General Use Label

Cancel Request

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ExLibris

Recalls

List of Items

Resource description: [Hard times / Dickens, Charles, 1812-1870. J.M. Dent & co London. 1907. 1912.](#)

Location: [Main Library, Main, PZ3.D55.H](#) [View all holdings](#)

Sort routine: Receiving date

Status: All

[Add Item](#) | [Find Items](#) | [Change Holdings](#) | [Open Predicted Items](#) | [Withdraw Items](#)

Find: 1-20

	Barcode	Library	Location	Call Number	Description	Temporary Location	Status	Process type	Access Number
1	552	Resource Sharing Library	Lending Resource Sharing Requests	PZ3.D55.H	-	Yes	Item not in place	Resource Share	-
2	54065	Main Library Reading Room	UNASSIGNED location	PZ3.D55.H	-	Yes	Item not in place	Loan	-

On Loan Item

On Loan Item

Title: Hard times / by Charles Dickens.

Description: -

Borrower: [ext_support ext_support1](#)

Loan Date: 15/02/2017 02:59:23 CST

Due Date: 15/02/2017 03:00:23 CST

Loan status: Recalled

Process ID: 1906807920000561

Booking loan?: No

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Recalls

You can configure which loans are recalled first if the requested resource has both copies that were shipped to a remote borrower and copies loaned to local patrons. The parameter that controls this choice, **rs_prefer_recall_method**, defaults to **False** (see [Configuring Other Settings](#)). Changing it to **True** recalls the shipped item first, rather than the locally loaned copy.

Recalls are supported if the borrowing workflow profile includes the **Recall item** action (see [Configuring Workflow Profiles](#)).

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Recalls

Resource Sharing Lending Requests Task List Being Processed

Limit results to: Assigned to Me Unassigned Assigned to Others

Activity Status: Active Add Refresh

Search limited to: Creation Date: Today

☐ Select All

1 ☐ **Hard times / by Charles Dickens.**
Book (Book - Physical) By Dickens, Charles, (London : J M Dent & co 1907, 1912.)
 LCCN: a 10000494
 Series: Everyman's library. [no. 292]
 External identifier: 1/TRINTEGRATION0009058 Requested Media: Any
Availability: Physical version at **MAIN: main: PZ3.D55 H**
 Physical version temporarily at **RR: UNASSIGNED: PZ3.D55 H** (1 copy, 0 available)
 Physical version temporarily at **RES_SHARE: IN_RS_REQ: PZ3.D55 H** (1 copy, 0 available)
 Barcode: 569
 Due Date: 22/02/2017
 Request Status: Recalled item Resource Locate Status: Resource Located
 Request Printed: No Request Reported: No
 Creation Date: 15/02/2017 Update Date: 15/02/2017
 Level of Service: Priority (Local)
 Request with active notes
Alerts: Citation Move Request Cancelled
 Citation Move Request Completed
 Citation Move Request In Process
[Edit](#) | [Manage Fulfillment Options](#) | [Duplicate](#) | [Reassign](#) | [Search](#) | [Detach from MMS](#) | [Release Assign](#) | [Print Slip](#) | [Ship](#)

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ExLibris

Recalls

Resource Sharing Borrowing Requests Automat

Limit results to: Activity Status: Active Add Refresh

Ex Libris Implementer

Dear_Ex Libris

Your borrowed item has been recalled. See details for change in due date

Loans

Title	Description	Author	Old Due Date	New Due Date	Library
Hard times /		Dickens, Charles,	20/07/2017 17:00:00 CDT	22/02/2017 06:45:54 CST	Resource Sharing Library

Sincerely
Circulation Department

Item from another institution ☐
 Scan item barcode OK Create Item Loan Display All Find

Renew Selected Renew All Change due date

Title	Due Date	Barcode	Call Number	Fine	Loan Date	Loan Status
1 <input type="checkbox"/> Hard times /	22/02/2017 06:45:54 CST	RS-TRINTEGRATION0009058			15/02/2017	Recalled

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ExLibris

Recalls

Resource Sharing Partner

Partner Code: TR_INST Partner Name: Training Institution

General Information Contact Information Parameters Notes

Partner Information

Code * TR_INST Name * Training Institution

Profile Type * ISO Status Active

System Type * Alma

Average Supply Time 0 Delivery Delay (days) 0

Currency Borrowing Workflow Borrowing

Supports Borrowing Lending Workflow Lending

Supports Lending Institution Code 01BC_INST

Locate Profile Demo Institution

Holding Code

Workflow Profiles

Add Workflow Profile

Workflow Profile	Type	Steps	Actions
1 BORROW	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 Request Renew requested Report damaged item to partner Report lost item to partner Request accepted Waiting for cancel response Waiting for receive digitally with Request	Actions
2 Borrowing	Borrowing	Cancel request not accepted Cancelled by Patron Cancelled by partner Cancelled by staff Declared lost by partner Lender check in Manual renew Request Renew requested Report damaged item to partner Report lost item to partner Request accepted Waiting for cancel response	Actions

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ExLibris

Recalls

Edit Fulfillment Unit

You are configuring: Resource Sharing Library

Name Resource Sharing Fulfillment Unit Code RES_FU

Fulfillment Unit Details Fulfillment Unit Locations Fulfillment Unit Rules

Rule Type Lending Resource Sharing

Filter All

Add Rule

	Enabled	Move Up	Move Down	Rule Name	Description	Output
1	<input checked="" type="checkbox"/>			LRS 4 week loan	Lending resource 4 week loan	Lending resource sharing

Default Data

You are configuring: Resource Sharing Library

Please Confirm Terms of Use Setup

Terms Of Use Lending resource sharing

Due Date	4 week Loan	-
Maximum Renew Date	1W	-
Resource Sharing Recall Period	1 week recalled item	-

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Form Customization



Form Customization

55	rs_support_and_service	fulfillment	fulfillment
56	rs_use_new_mashup_form	fulfillment	true
57	rs_half_checkout_form_checkout	fulfillment	false

Fulfillment Configuration

Library

Opening Hours Relationships Target Time Circulation Desks SIP2 Bin Configuration

Locations

Physical Locations Remote Storage

Physical Fulfillment

Fulfillment Units Terms of Use and Policies Block Preferences Auto Loan Renewal Rules Item Policy Advanced Policy Configuration Overdue and Lost Loan Profile

Request Task Name Request Pickup Configuration Self Check Messages Loan Anonymization Rules

Patron Configurations

Patron Groups Patron Limits Loan Limits User Block Definition User Block Definitions User Demerits

Digital Fulfillment

Digitalization Departments Digitization Profile Rules Access Rights Copyright Declaration Electronic Document Delivery Rules Copyright Publishers

Courses

Processing Departments Academic Departments Additional Reading List Citation Statuses Course Terms Citation Attributes Types Citation Attributes Citation Attributes

Default Copyright Status Locate Citation by Fields Tags Tag Mapping

Resource Sharing

Workflow Profiles Copyright Rota Assignment Rules Locate Profiles Shipping Cost Lender Rules Shipping Cost Borrower Rules Sending Borrowing Request Rules

Additional Requested Media Requested Media Definition Levels of Service Library Mapping Brief Audit Fields Resource Languages Item Policy Exceptions Requested Media Definition

Copyright Status

Discovery Interface Display Logic

Display Logic Rules Labels Related Records Direct Linking General Electronic Services Online Services Order General Electronic Services Order Locations Order

Primo View to Libraries Hold Request Form Customization Booking Request Form Customization Digitization Request Form Customization Resource Sharing Form Customization

Form Customization

Book fields

	Move Up	Move Down	Field Name	Mandatory	Visible
1			Citation type		
2			Title		
3			Author (Last name, first name)		
4			Author initials		
5			Signature: Edition Only		
6			Edition		
7			ISBN		
8			LOCN		
9			OCLC Number		
10			Publisher		
11			Publication date		
12			Place of publication		
13			Additional Author (Last name, first name)		
14			Volume		
15			Part		
16			Chapter		
17			Source		
18			Series Title Number		
19			Pages to photocopy		

First Move Selected

Article fields

	Move Up	Move Down	Field Name	Mandatory	Visible
1			Citation type		
2			Article title		
3			Journal title		
4			Author (Last name, first name)		
5			Author initials		
6			Volume		
7			Issue		
8			ISBN		
9			LOCN		
10			OCLC Number		
11			DOI		

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Form Customization

Fulfillment Configuration

Library

Opening Hours Relationships Transit Time Circulation Desk SIP2 Bin Conf

Locations

Physical Locations Remote Storage

Physical Fulfillment

Fulfillment Units Terms of Use and Policies Block Preferences Auto Loan Renewal R

Request Task Name Request Pickup Configuration Self Check Messages Loan Annon

Patron Configurations

Patron Groups Patron Limits Loan Limits User Block Description User Block

Digital Fulfillment

Digitization Departments Digitization Profile Rules Access Rights Copyright Declarati

Courses

Processing Departments Academic Departments Additional Reading List Citation Statuses

Default Copyright Status Locate Citation by Fields Tags Tag Mapping

Resource Sharing

Workflow Profiles Copyright Rota Assignment Rules Locate Profiles Shipping

Additional Requested Media Requested Media Definition Levels of Service Library M

Copyright Status

Discovery Interface Display Logic

Display Logic Rules Labels Related Records Direct Linking General Elector

Prime View to Libraries Hold Request Form Customization Booking Request Form Customizati

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Form Customization

<input type="checkbox"/> c:resolver.request.ii.owner	For Library (please select):	For Library (please select)
<input type="checkbox"/> c:resolver.request.ii.citationType	Citation type:	Citation type:
<input type="checkbox"/> c:resolver.request.ii.citationType.book	Book	Book
<input type="checkbox"/> c:resolver.request.ii.citationType.article	Article	Article
<input type="checkbox"/> c:resolver.request.ii.format	Format:	Format:
<input type="checkbox"/> c:resolver.request.ii.format.physical	Physical	Physical
<input type="checkbox"/> c:resolver.request.ii.format.digital	Digital	Digital
<input type="checkbox"/> c:resolver.request.ii.format.physicalNonReturnable	Physical non-returnable	Physical non-returnable
<input type="checkbox"/> c:resolver.request.ii.deliveryLocation	Delivery Location:	Delivery Location:
<input type="checkbox"/> c:resolver.request.ii.delivery.library	Deliver to library	Deliver to library
<input type="checkbox"/> c:resolver.request.ii.delivery.alternative	Alternative address	Alternative address
<input type="checkbox"/> c:resolver.request.ii.delivery.alternate	Alternate address	Alternate address
<input type="checkbox"/> c:resolver.request.ii.delivery.alternative.email	Email Address	Email Address
<input type="checkbox"/> c:resolver.request.ii.delivery.alternative.postal.line1	Line 1:	Line 1:
<input type="checkbox"/> c:resolver.request.ii.delivery.alternative.postal.line2	Line 2:	Line 2:
<input type="checkbox"/> c:resolver.request.ii.delivery.alternative.postal.line3	Line 3:	Line 3:
<input type="checkbox"/> c:resolver.request.ii.delivery.alternative.postal.line4	Line 4:	Line 4:
<input type="checkbox"/> c:resolver.request.ii.pickupLocation	Pickup/delivery location:	Pickup/delivery location:
<input type="checkbox"/> c:resolver.request.ii.notNeededAfter	Not Needed After:	Not Needed After:
<input type="checkbox"/> c:resolver.request.ii.comment	Comment:	Comment:
<input type="checkbox"/> c:resolver.request.ii.submitRequest	Request	Request
<input type="checkbox"/> c:resolver.request.ii.cancel	Cancel	Cancel
<input type="checkbox"/> c:resolver.request.ii.authors	Author (Last name, first name):	Author (Last name, first na
<input type="checkbox"/> c:resolver.request.ii.authinit	Author initials:	Author initials:
<input type="checkbox"/> c:resolver.request.ii.edition	Edition:	Edition:
<input type="checkbox"/> c:resolver.request.ii.publisher	Publisher:	Publisher:
<input type="checkbox"/> c:resolver.request.ii.title	Title:	Title:
<input type="checkbox"/> c:resolver.request.ii.articleTitle	Article title:	Article title:
<input type="checkbox"/> c:resolver.request.ii.volume	Volume:	Volume:
<input type="checkbox"/> c:resolver.request.ii.part	Part:	Part:
<input type="checkbox"/> c:resolver.request.ii.chapter	Chapter:	Chapter:
<input type="checkbox"/> c:resolver.request.ii.place_of_publication	Place of publication:	Place of publication:
<input type="checkbox"/> c:resolver.request.ii.year	Publication date:	Publication date:
<input type="checkbox"/> c:resolver.request.ii.issue	Issue:	Issue:
<input type="checkbox"/> c:resolver.request.ii.isbn	ISBN:	ISBN:
<input type="checkbox"/> c:resolver.request.ii.locus	LOCUS:	LOCUS:

Workflow Profiles



What are Workflow Profiles ?

- Resource sharing workflows may include many steps
- Not all steps may be desired by all libraries. For example:
 - Some libraries do not want to allow recalls
 - Some libraries do not want to allow patrons to request renewal
 - Some libraries want to allow patron to request renewals, but want to have a librarian mediate the renew request
- Workflow Profiles enable configuring which of the resource sharing steps are allowed for library managed workflows

How are they configured ?

- Alma allows defining separately:
 - Borrowing Workflow Profile.
 - For some actions the profile defines how the partner will be managed when the partner acts as my library's borrower.
 - For some actions the profile defines how the partner will be managed when the partner acts as my library's lender.
 - Lending Workflow Profile.
 - For some actions the profile defines how the partner will be managed when the partner acts as my library's lender.
 - For some actions the profile defines how the partner will be managed when the partner acts as my library's borrower.

You must look up the specific action you are configuring to know whether it should be configured on the Borrowing or on the Lending Workflow Profile

For Example ...

- In the below example:
 - The BORROW Workflow Profile defines how resource sharing workflow will be managed when Evergreen State is the borrower to which my library is lending
 - You must look up the specific action you are configuring to know whether it should be configured on the Borrowing or on the Lending Workflow Profile

The screenshot shows the 'Resource Sharing Partner' configuration page for 'Evergreen State'. The 'Partner Information' tab is active. The 'Borrowing Workflow' is set to 'BORROW' and the 'Lending Workflow' is set to 'LEND', both highlighted with a blue box. Other fields include Code: ES, Profile Type: ISO, System Type: Alma, Average Supply Time: 0, Currency, Supports Borrowing (checked), Supports Lending (checked), Locate Profile (Training Institution), Holding Code (GRAD), Name: Evergreen State, Status: Active, Delivery Delay (days): 0, and Institution Code: TR_INTEGRATION_INST.

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How are they configured ?

The screenshot shows the 'Fulfillment Configuration' interface. The 'Workflow Profiles' section is highlighted with a blue box. It includes a table with columns for 'Workflow Profile', 'Workflow Type', 'Workflow Name', 'Workflow Description', 'Workflow Status', 'Workflow Action', 'Workflow Parameters', and 'Workflow Settings'. The 'Borrowing Workflow' is listed as 'BORROW' and the 'Lending Workflow' is listed as 'LEND'. Other workflow profiles include 'Physical Fulfillment', 'Digital Fulfillment', 'Courses', 'Processing Departments', 'Academic Departments', 'Additional Reading List Creation', 'Course Terms', 'Citation Attributes', 'Citation Attributes To Citation Attributes Types', 'Default Copy/Print Status', 'Workflow Profiles', 'Workflow Type', 'Workflow Name', 'Workflow Description', 'Workflow Status', 'Workflow Action', 'Workflow Parameters', and 'Workflow Settings'.

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How are they configured ?

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How are they configured ?

- Workflow Profiles are linked to Partner records, and define how the workflows will be managed when that partner is the peer partner

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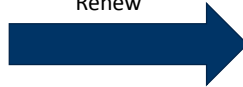
ExLibris

Borrowing Workflow Profile – Automatic Renew

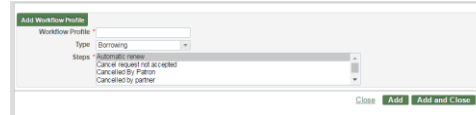
- This action is relevant for workflows of type:
 - ISO
 - NCIP P2P



Renew



When the linked partner borrowed from me and is requesting to renew:
Will I automatically respond with 'Renew Accepted' and renew the shipped loan

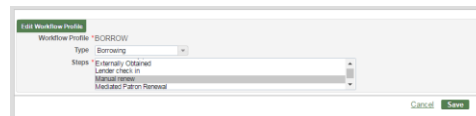


Borrowing Workflow Profile – Manual Renew

- This action is relevant for all workflow types



Will I be able to renew items that have been shipped to the linked partner



Borrowing Workflow Profile – Manual Renew

- This action is relevant for all workflow types



**Borrower
Library**

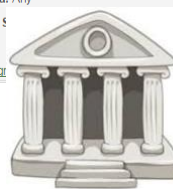
Assigned to Me Unassigned Assigned to Others

Activity Status: Active

[Add](#) [Refresh](#)

☐ Select All

1	<input type="checkbox"/> Renew Example	Requested Media: Any
	External identifier: 6465456645	
	Barcode: 1212	Due Date: 25/04/2016
	Request Status: Shipped Physically	Resource Location: 5
	Request Printed: No	Request Reported: No
	Creation Date: 28/03/2016	Update Date: 28/03/2016
	Level of Service: Normal (Local)	
	Edit Duplicate Reassign Renew Release Assign	message More details



**Lender
Library**

Will I be able to renew items that have been shipped to the linked partner

Borrowing Workflow Profile – Mediated Patron Renew

- This action is relevant for all workflow types



**Borrower
Library**

Edit Workflow Profile

Workflow Profile: BORROW

Type: Borrowing

Steps: Externally Obtained
Lender checked in
Manual renew
Mediated Patron Renewal

[Cancel](#) [Save](#)




**Lender
Library**

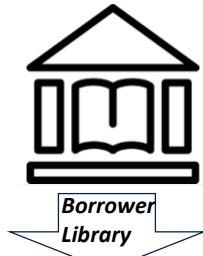
When the linked partner is my lender:

- Patron may request renewal from Primo
- If patron requests to renew, the renew message will not be automatically sent to the lender. Instead, the request status will change to Mediated Patron Renewal

Borrowing Workflow Profile – Mediated Patron Renew

- This action is relevant for all workflow types

5 ☒ **Cancel Example**
 Book
 External Identifier: TRINTEGRATION0008950 Internal Identifier: 1083693720000561
 Request Status: Mediated Patron Renewal Partner: Training Institution
 Requested media: Any Requester: Impresenter, Ex Libris 
 Pickup At: Main Library
 Creation Date: 28/03/2016 Update Date: 28/03/2016
[Edit](#) | [Duplicate](#) | [Send](#) | [Send query to patron](#) | [Receive](#) | [Recall](#) | [Locate Resource](#)



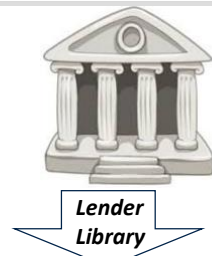
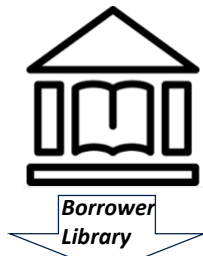
When the linked partner is my lender:

- Patron may request renewal from Primo
- If patron requests to renew, the renew message will not be automatically sent to the lender. Instead, the request status will change to Mediated Patron Renewal

Borrowing Workflow Profile – Cancelled by Patron

- This action is relevant for all workflows types

Edit Workflow Profile
 Workflow profile: BORROW
 Type: Borrowing
 Steps: Automatic renew
 Cancel request not accepted
 Cancelled by patron
 Cancelled by patron
[Cancel](#) [Save](#)



When the linked partner is my lender:

Can the patron cancel the request from the Primo My Account requests list

Borrowing Workflow Profile – Cancelled by Staff

- This action is relevant for all workflows types



**Borrower
Library**



**Lender
Library**

**When the linked partner is my lender:
Can the staff cancel the request from the Alma screen**

Borrowing Workflow Profile – Cancelled by Staff

- This action is relevant for all workflows types



**Borrower
Library**

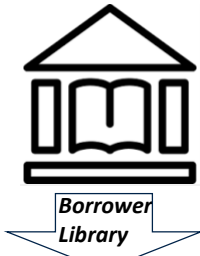


**Lender
Library**

**When the linked partner is my lender:
Can the staff cancel the request from the Alma screen**

Borrowing Workflow Profile – Waiting for Cancel Response

- This action is relevant for workflows of type:
 - ISO
 - NCIP P2P



**When the linked partner is my lender:
Will I wait for a cancellation response.**

- If selected, every cancelled request will be Waiting for Cancel Reply until lender accepts the cancellation**

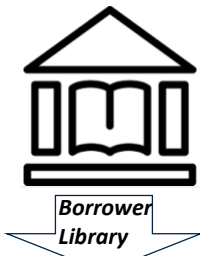
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Borrowing Workflow Profile – Waiting for Cancel Response

- This action is relevant for workflows of type:
 - ISO
 - NCIP P2P



**When the linked partner is my lender:
Will I wait for a cancellation response.**

- If not selected, every cancelled request will be considered cancelled without waiting for the lender to accept the cancellation**

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Borrowing Workflow Profile – Recalled by Partner

- This action is relevant for workflows of type:
 - ISO
 - NCIP P2P



**Borrower
Library**



**Lender
Library**

If selected:
Request that has been shipped to the borrower
will be recalled if requested by a library patron

Borrowing Workflow Profile – Reject

- This action is relevant for all workflow types:



**Borrower
Library**



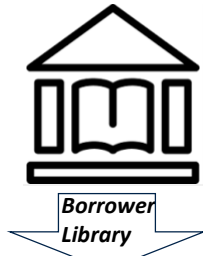
**Lender
Library**

When the linked partner is my lender:
Can I manually reject the request using the Reject option

Borrowing Workflow Profile – Reject

- This action is relevant for all workflow types:

5 ☐ [Cancel Example](#)
Book
 External identifier: TRINTEGRATION0008950 Internal Identifier: 1083693720000561
 Request Status: Mediated Patron Renewal Partner: Training Institution
 Requested Media: Any Requester: Implementer, Ex Libris [A](#)
 Pickup At: Main Library Update Date: 28/03/2016
 Creation Date: 28/03/2016
[Edit](#) | [Duplicate](#) | [Send](#) | [Send query to patron](#) | [Receive](#) | [Recall](#) | [Reject](#) | [Locate Resource](#)



The recommended use is for ISO and NCIP P2P partners to disable this option. For these users, the rejection is expected to be reported by the lender and not manually triggered by the borrower

Borrowing Workflow Profile – Lender Check In

- This action is relevant for workflows of type:
 - ISO
 - NCIP P2P

Edit Workflow Profile
 Workflow Profile: BORROW
 Type: Borrowing
 Steps: Canceled by staff
 Canceled by patron
 Externally Obtained
 Lender check in
 Cancel Save



if selected:

Request that has been returned by the borrower will be not be closed until checked in

Borrowing Workflow Profile – Lender Check In

- This action is relevant for workflows of type:
 - ISO
 - NCIP P2P



*Borrower
Library*



*Lender
Library*

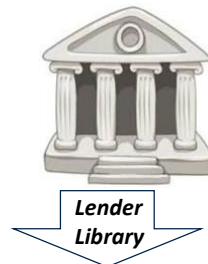
If not selected:
Request that has been returned by the borrower
will be closed automatically

Borrowing Workflow Profile – Receive Digitally

- This action is relevant for workflows of all types



*Borrower
Library*



*Lender
Library*

If selected:
Request that has been shipped digitally to the
linked borrower will remain open until a Received
indication is received from the borrower

Borrowing Workflow Profile – Receive Digitally

- This action is relevant for workflows of all types



**Borrower
Library**



**Lender
Library**

If not selected:

Request that has been shipped digitally to the linked borrower will be considered closed

Borrowing Workflow Profile – Will Supply

- This action is relevant for workflows of types:
 - ISO
 - NCIP P2P



**Borrower
Library**

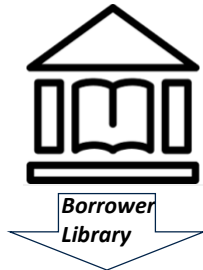


**Lender
Library**

Will I be able to respond with 'Will Supply' to requests that have been received from a linked borrower

Borrowing Workflow Profile – Externally Obtained

- This action is relevant for workflows of type:
 - External System



This option should be used when the lending partner is the CCC GetItNow partner. Please refer to

https://knowledge.exlibrisgroup.com/Alma/Training/02_What's_New_Videos/2015/01_December_2015_Release/Support_for_CCC_GetItNow_Service_in_Resource_Sharing for more information

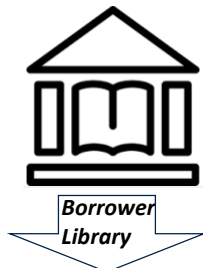
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Lender Workflow Profile – Lender Check In

- This action is relevant for workflows of all types:



When the linked partner is my lender:

If not selected then returned borrowing requests will be considered completed once returned, without waiting for a lender confirmation

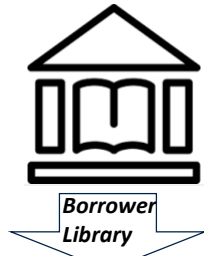
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Lending Workflow Profile – Renew Response

- This action is relevant for all workflow types

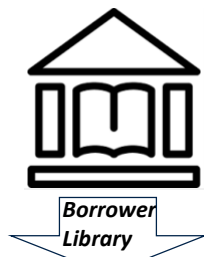



When the linked partner is my lender:

If **selected** then renew requests will be considered 'Waiting for Renew Approval' until lender approval is received

Lending Workflow Profile – Renew Response

- This action is relevant for all workflow types

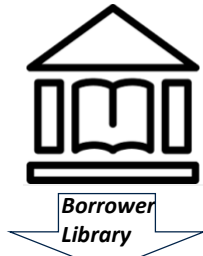



When the linked partner is my lender:

If **not selected** then renew requests will be considered approved without waiting for lender approval

Lending Workflow Profile – Patron Renewal

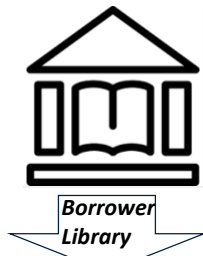
- This action is relevant for all workflow types





**When the linked partner is my lender:
Will patrons be able to request renewals from Primo**

Lending Workflow Profile – Staff Renewal

- This action is relevant for all workflow types




**When the linked partner is my lender:
Will staff be able to request renewals from Alma**



Next Steps and Support Resources

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Next Steps and Support Resources

- https://knowledge.exlibrisgroup.com/Alma/Product_Materials/Overview_Materials/More_Information_About...

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Q & A

Any Questions?



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Session Survey Evaluation

Please use the following link
<https://www.surveymonkey.com/r/techsem2017> to provide feedback on your sessions.

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