Configuring Resource Sharing

For additional configuration tasks related to resource sharing, see:

- To set up a resource sharing library, see Configuring Parameters of a Resource Sharing Library.
- Configuring a Resource Sharing Copyright Declaration
- Configuring Resource Sharing Copyright Statues

Configuring Temporary Item Creation Rules

To configure temporary item creation rules, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

A temporary item creation rule applies to a resource sharing library. A temporary item creation rule indicates that items coming from a specified partner must be moved to a specific location. You then configure a regular fulfillment rule which indicates that, for items in the temporary item creation rule, a specific Terms of Use must be invoked.

For example, you configure a temporary item creation rule which indicates that items coming from partner A must be moved to location X. You then configure a regular fulfillment rule which indicates that, for items in location X (the location specified in the temporary item creation rule), Terms of Use Y is to be invoked. For details on configuring regular fulfillment rules, see Editing a Fulfillment Unit.

You configure temporary item creation rules on the Temporary Item Creation Rule page (Configuration Menu > Fulfillment > Library Management > Temporary Item Creation Rules). For more information about rules tables, see Rules Tables.

Temporary Item Creation Rule Page

The Temporary Item Creation Rules option appears only when you are in the context of a Resource Sharing Library; select Resource Sharing Library from the Configuring filter on the Fulfillment Configuration page.

The temporary item creation rules list displays rules only for the library that is currently being configured.

Temporary item creation rules are configured similarly to regular fulfillment rules (see Editing a Fulfillment Unit), with the
following differences:

- For **Input Parameters**, the following values are available:
  - Circulation desk
  - Days until due date – Enables you to create a rule based on the number of days from receiving an item until the item’s due date.

  For example:
  - **Name** = Days until due date
  - **Operator** = Greater than
  - **Value** = 15

  These parameters indicate that if there are more than 15 days from the time of receiving the item until the due date, the item belongs to the location indicated in the **Location** field, according to the policy indicated in the **Item policy** field. The **Location** and **Item policy** fields are located in the **Output Parameters** section.

  - Resource sharing partner

- For **Output Parameters**, specify the Location to which to move the items, and the Item Policy to invoke. When working with an NCIP partner, the value in the Location field is used as the default location for the temporary item that is created when receiving a borrowing request.

---

### Configuring Workflow Profiles

To configure workflow profiles, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Workflows, defined by workflow profiles, control the actions that can be performed on the borrowing and lending request task lists for the defined partner. You can configure the borrowing and lending workflow steps that are available when adding a new partner. (For information on configuring partners, refer to [Resource Sharing Partners](#).) These steps correspond to additional statuses that can be assigned to requests, in addition to certain internally defined statuses that are always available.

For example, a workflow profile may include that a patron can cancel a request and/or renew an item. Workflow profiles are available in the **Borrowing workflow** or **Lending workflow** drop-down list on the Resource Sharing Partner page.

---

**Note**

For more information on workflow profiles, see [Workflow Profiles](#).

---

You configure workflow profiles on the Workflow Profiles page (Configuration Menu > Fulfillment > Resource Sharing > Workflow Profiles).
Workflow profiles that were distributed from a network are indicated by a check mark in the Shared column.

The following actions can be performed on this page:

- Add workflow profiles (see Adding Workflow Profiles)
- Edit workflow profiles (select Edit from the row actions list)
- Delete workflow profiles (select Delete from the row actions list)

If a workflow is associated with a resource sharing partner, you cannot delete it until you first delete the partner.

---

**Adding Workflow Profiles**

The workflow profiles that you add on the institution level are available for all libraries within the institution.

**To add a workflow profile:**

2. Enter a name for the workflow profile.

3. From the **Type** drop-down list, select **Borrowing** or **Lending**.

4. Select the steps you want added to the profile. More than one step can be selected. These steps control the actions that can be performed on the borrowing and lending request task lists for the partner associated with the workflow.

The available steps depend on the workflow profile type selected in step 3, and are described in the following table:

<table>
<thead>
<tr>
<th>Workflow Profile Steps</th>
<th>Type</th>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
</table>
|                        |      | Automatic renew           | Enable automatic renewal of requests received for borrowing partners linked to the specified workflow. A request whose profile contains this step is automatically renewed as per the requested due date, and the request's status updates to **Renew Request Accepted**.
<p>|                        |      |                           | <strong>Note</strong>                                                                                                                                 |
|                        |      |                           | Automatic renewal is possible only for ISO partners.                                                                                         |
|                        |      | Cancel request not accepted | A cancelation request can be rejected by the partner.                                                                                       |
|                        |      | Canceled by patron        | A request can be canceled by a patron.                                                                                                       |
|                        |      | Canceled by partner       | A request can be canceled by the lending partner and notification is received by the borrowing partner.                                        |
|                        |      | Canceled by staff         | A request can be canceled by a staff member.                                                                                                |
|                        |      | Conditional               | Support <strong>Conditional</strong> status and conditional replies.                                                                                     |
|                        |      | Damaged communicated      | A damaged item can be reported by the partner. When enabled, the <strong>Damaged</strong> row action is enabled for a borrowing request. See <a href="#">Managing Resource Sharing Borrowing Requests</a>. |
|                        |      | Declared lost by partner  | An item can be declared lost by the partner.                                                                                                 |
|                        |      | Externally Obtained       | An item can be requested from the CCC GetItNow service.                                                                                     |
|                        |      | Lender check in           | The request is not closed by the borrower until a message is received that the item was checked in.                                          |
|                        |      |                           | <strong>Note</strong>                                                                                                                                     |
|                        |      |                           | This option should not be selected in workflow profiles that are used by broker partners because it causes the request to wait for lender confirmation. |
|                        |      | Lost communicated         | A lost item can be reported by the partner. When enabled:                                                                                   |</p>
<table>
<thead>
<tr>
<th>Type</th>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Manual renew</strong></td>
<td>Enable manually approving renewal requests for borrowing partners linked to the specified workflow profile. For details on system behavior when this option is selected, see the Renew and Renew Reply entries in Workflow Actions.</td>
</tr>
<tr>
<td></td>
<td><strong>Mediated Patron Renewal</strong></td>
<td>Enable Mediated Patron Renewal to require operator review before renewals are transmitted to the lender. A mediated renewal will display the status of Mediated Patron Renewal while it is waiting for operator review. Once requests are sent to the lending institution, the request status is set to Renew Requested.</td>
</tr>
<tr>
<td></td>
<td><strong>Reactivated</strong></td>
<td>Support Reactivate Request action.</td>
</tr>
<tr>
<td></td>
<td><strong>Recalled by partner</strong></td>
<td>The request can be recalled by the partner.</td>
</tr>
<tr>
<td></td>
<td><strong>Reject</strong></td>
<td>Reject controls the display of the reject action in the task list of the borrowing request and in the rota tab. It is selected by default. Deselecting Reject removes the reject action from the task list and the rota tab of the request. Also while deselected, the reject action in the action drop down list at the top of borrowing requests is not executed and will display an alert.</td>
</tr>
<tr>
<td></td>
<td><strong>Renew requested</strong></td>
<td>Enable requesting renewal of resource sharing borrowing requests.</td>
</tr>
<tr>
<td></td>
<td><strong>Request accepted</strong></td>
<td>A requested item can be accepted by the partner.</td>
</tr>
<tr>
<td></td>
<td><strong>Waiting for cancel response</strong></td>
<td>When this option is selected, if a borrower cancels a request, the request will not actually be canceled until the lender sends a cancellation response.</td>
</tr>
<tr>
<td></td>
<td><strong>Waiting for receive digitally</strong></td>
<td>This determines when the lender can close a request. When selected, a response must be received from the borrower before closing. When not selected, the lender can close the request when shipping digitally.</td>
</tr>
<tr>
<td>Type</td>
<td>Step</td>
<td>Description</td>
</tr>
<tr>
<td>------------</td>
<td>---------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>Will Supply</td>
<td>A partner can change the status of the request if it has not yet shipped but will soon.</td>
</tr>
<tr>
<td>Lending</td>
<td>Borrower Recall</td>
<td>The recall option is hidden on the borrowing request's row actions when this step is disabled. When the step is enabled, which is the default, the recall option is displayed.</td>
</tr>
<tr>
<td></td>
<td>Cancel reply</td>
<td>Not currently supported</td>
</tr>
<tr>
<td></td>
<td>Conditional</td>
<td>Support Conditional status and conditional replies.</td>
</tr>
<tr>
<td></td>
<td>Lender check in</td>
<td>Sends a confirmation message to the borrower that the item has been checked in. <strong>Note</strong> This option should not be selected in workflow profiles that are used by broker partners because it causes the request to wait for lender confirmation.</td>
</tr>
<tr>
<td></td>
<td>Patron renewal</td>
<td>Enable a patron to request renewal of resource sharing items. In addition to enabling this option, you must also ensure that the Is Renewable policy value in the relevant Terms of Use is set to Is Renewable (see Configuring Fulfillment Units, Policies, and Terms of Use).</td>
</tr>
<tr>
<td></td>
<td>Reactivated</td>
<td>Support Reactivate Request action. <strong>Note</strong> To enable this feature, you must contact Ex Libris Support.</td>
</tr>
<tr>
<td></td>
<td>Renewal response</td>
<td>The borrower requesting renewal waits for a response from the lender before renewal can be carried out. When this step is enabled, the status of a request for which renewal was requested becomes Renew Requested.</td>
</tr>
<tr>
<td></td>
<td>Staff renewal</td>
<td>Renewal can be invoked by a staff member. When this step is enabled, the Renew link appears on the Resource Sharing Borrowing Requests page.</td>
</tr>
</tbody>
</table>

5. Select one of the following:
   - **Add** - Add the workflow profile but leave the dialog box open so that you can add additional workflow profiles.
   - **Add and Close** - Add the workflow profile and close the dialog box.

   The workflow profile is now available in the Borrowing workflow or Lending workflow drop-down list on the Resource Sharing Partner page.

---

**Configuring Rota Assignment Rules**

To configure rota assignment rules, you must have one of the following roles:

- Fulfillment Services Operator
- Fulfillment Services Manager

Rota assignment rules determine the conditions under which rota templates are invoked.
You configure rota assignment rules on the Rota Assignment Rules List page (Configuration Menu > Fulfillment > Resource Sharing > Rota Assignment Rules). For more information about rules tables, see Rules Tables.

Rota Assignment Rules List Page

Rota assignment rules can be configured at the Network Zone, institution, or library level.

In a collaborative network, you can configure rota templates in the Network Zone and have the changes distributed to the member institutions by a job. For more information, see Configuring Fulfillment Information in the Network Zone.

The following actions can be performed on this page:

- Configure rota assignment rules for an institution
- Configure rota assignment rules for a library

To configure rota assignment rules for an institution:


2. In the Rota Assignment Rules section, enter a rule for the name in the Name field.
3. Configure input parameters: these parameters specify the conditions (Name, Operator, and Value) for which the rota template specified by the output parameter is assigned to the request.
   ◦ **Name**: One of:
     - **Level of Service** - Assigned when the request requires one of the selected levels of service
     - **Price** - Assigned when the request's price is greater than, equal to, or less than the specified price
     - **Requested Format** - Assigned when the request requires one of the specified request types
     - **Required in Number of Days** - Assigned when the requested duration is greater than, equal to, or less than the specified number of days
     - **User Group** - Assigned when the user making the request is in one of the specified user groups
   ◦ **Operator** - a comparison operator
   ◦ **Value**: These depend on the Name parameter:
     - **Level of Service** - Select one (or more) levels of service (see Level of Service in Manually Adding a Borrowing Request).
     - **Price** - Enter a price. If this value is less than 1, enter a leading 0. For example, 0.44, not .44.
     - **Requested Format** - Select one (or more) requested formats (see Requested Format in Manually Adding a Borrowing Request).
     - **Required in Number of Days** - Enter a number of days.
     - **User Group** - Select one (or more) predefined user groups.

4. Configure output parameters in the relevant fields: Select the rota template that is applied when the conditions specified by the input parameters are met.

5. Select Save. The configured rule appears on the Rota Assignment Rules List page.

When the configured rule parameters are met for a resource sharing request, the specified rota template is invoked.

To attach a rota to a request according to the configured rules, select the Recalculate Rota Assignment link on the Resource Sharing Borrowing Requests page (see Manually Adding a Request).

When the rota assignment is recalculated, if the first partner in the list is inactive, the assignment process continues searching until it finds a partner in an active status.

To configure rota assignment rules for a library:

1. On the Rota Assignment Rules List page, ensure that a library is selected in the Configuring filter at the top of the page. Rules configured on the library level appear in the Library Rules List section and rules configured on the institution level display in the Institution Rules List section.
2. To add a rule, select Add Rule and see the above steps for configuring a rule for an institution.

3. To copy an institution rule to the library level:
   a. In the Institution Rules List section, select Copy to Library. The Rota Assignment Rules page appears.
   b. Modify the rule parameters, as required, and select Save. The specified rule appears in the Library Rules List section.

Configuring Locate Profiles

To configure locate profiles, you must have one of the following roles:

- Fulfillment Services Operator
- Fulfillment Services Manager

A locate profile defines how you search the resource sharing partner's catalog. After configuring a location profile, you associate the profile to a partner. For more information, see Locating Items.


Note

Locate profiles can be configured at the institution level only. Select the required institution from the Configuring filter.
Locate profiles that were distributed from a network are indicated by a check mark in the **Shared** column.

The following actions can be performed on this page:

- Add locate profiles (see *Adding Locate Profiles*)
- Edit locate profiles (select *Edit* from the row actions list; the fields appearing on the Locate Profile Parameters tab page depend on the type of locate profile selected)
- Duplicate locate profiles (select *Duplicate* from the row actions list and modify the relevant fields)
- Delete locate profiles (select *Delete* from the row actions list)

### Adding Locate Profiles

You can add a locate profile to Alma.

**To add a locate profile:**

1. On the Locate Profiles List page ([Configuration Menu > Fulfillment > Resource Sharing > Locate Profiles]), select **Add Locate Profile**. The Locate Profile Details page appears.

2. Enter a name and description for the locate profile in the relevant fields.

3. In the **Type** field, select the profile type. Choose from the following options:
   - **Alma** - The sharing institution also uses Alma.
   - **No Locate** - The default partner is used and therefore no attempt is made to locate another partner.
   - **Z39.50** - The Z39.50 communications protocol is used for searching remote catalogs. For details on the Z39.50 protocol, see [https://developers.exlibrisgroup.com/alma/integrations/Z39.50](https://developers.exlibrisgroup.com/alma/integrations/Z39.50)
   - **BLDSS** - The BLDSS API is used for searching the British Library catalogs. For more information, see [British Library Document Supply Service (BLDSS)](https://www.bl.uk/about/bldss).
   - **Fulfillment Network** - The fulfillment network type is used for institutions that share the same fulfillment network. For more information, see [Automated Fulfillment Network Requests (AFN)](https://support.exlibris.com/knowledge-base/automated-fulfillment-network-requests).

4. Select **Next**. The second page of the wizard opens. The page differs based on profile type, with the different profile types described in the steps below.

---

**Note**

If the **No Locate** profile type was selected, no additional parameters can be configured. Select **Save** to save the
5. For an Alma profile type, configure the following fields:

- In the **Server** field, enter the URL of the target Alma.
- In the **Port** field, enter the port number on which the external Alma system is located. This field may also be left blank.
- In the **Username** field, enter the username of the Z39.50 external interface in the target Alma system.
- In the **Password** field, enter the password of the Z39.50 external interface in the target Alma system. The characters you enter are encrypted.
- In the **Institution** field, enter the institution in which the external Alma system is located.

**Note**

The **Institution** field can be left blank (empty).

- For members of a Network Zone institution, select the **Alma network** check box to search against the Network Zone itself rather than each institution’s local catalog. Selecting this field also allows sharing this locate profile among all the network members. When checked, the Alma network code must be entered in the **Institution** field. When this check box is selected, the **Check item availability** and **Check item requestability** check boxes are deactivated.
- Select the **Check item availability** check box for the profile to check whether an item is available in the institution. An item is available if its status is **Item in Place**.
- Select the **Check item requestability** check box for the profile to check whether an item can be requested as part of a resource sharing request.
Select the Ignore Electronic and Digital Resources check box for the profile to check only for physical items. Any partner that contains only electronic and/or digital items is skipped in the rota.

Select the Ignore Physical Resources check box for the profile to check only for electronic and digital items. Selecting this field means that the locate process does not check physical resources and does not use the locate by, check item availability, or requestability fields.

Select the Allow Locate by Metadata check box to successfully locate an item even when the request between partners that share a Network Zone was not placed from the shared Network Zone discovery system. In this case, the locate process will use the request’s metadata to find a match in the partner’s catalog.

This option allows borrowers that share a Network Zone with the lenders to create resource sharing requests for records that are not shared in the Network Zone. It also allows hold requests to be converted to resource sharing requests even if the borrower and lender share a Network Zone.

Select the Locate by Fields check box to configure additional search fields when locating a resource for a borrowing request. The page refreshes and displays additional fields:

- Title
- Author
- ISBN/ISSN
- OCLC Number
- Edition
- LCCN

Select the fields by which you want resources to be searched for in the remote institution. Alma uses these fields when the specified locate profile is used in a search by the resource sharing partner (that is, when selecting Locate Resource on the Resource Sharing Borrowing Requests page).

Select Yes in the Locate only if all fields match field if you want the locate to be successful only when all selected fields match. If set to No, then:

- If the request has identifiers (such as ISBN, OCLC number, or LCCN) locate is successful if any of the selected identifier fields finds a match. Other fields such as Title and Author are not used for the match.
- If no identifier fields exist on the request, locate is only successful if all of the other selected fields match.

Select Test Connection to check connectivity to the server. (This doesn't check the authentication parameters.)

6. For a Z39.50 profile type, configure the displayed fields, as follows:

1. To add holdings to the search, select the Enrich with holdings check box. The holding field and subfield fields appear. Enter the relevant values in the fields. In this field+subfield, the partner's holdings code will be searched in the Bib record that is retrieved from the external resource. For the holdings code, see Resource Sharing Partners.

2. Select the Find resource field to search for a resource. The Search External Resource Setup page appears.

3. Enter search criteria in the Find box to search for a resource, and select Go. The Search External Resource Setup page appears. Choose an entry and select Select to return to the Locate Profile Details page.
4. In the **Credentials** field, enter any relevant credentials for the search.

5. Select **Test Connection** to check connectivity to the server. (This doesn't check the authentication parameters.)

7. For a **BLDSS** profile type, configure the displayed fields, as follows:
   1. Select **Succeed on possible match** to force the locate process to succeed even if the British Library determines that there are a number of possible matches.
   2. Select **Check availability** to match only on British Library resources that are readily available. This option is recommended if you would like to request a BL resource only if it is available for immediate supply.
   3. The **Locate By Fields** option enables configuring what metadata will be used by the locate process. This parameter is optional and may be left unchecked. The system will then use its internal defaults.

8. For a **Fulfillment Network** profile type, configure the displayed fields, as follows:
   1. In the **Server** field, enter the URL of the target Alma.
   2. In the **Port** field, enter the port number on which the external Alma system is located. This field may also be left blank.
   3. In the **Username** field, enter the username of the external interface in the target Alma system.
   4. In the **Password** field, enter the password of the external interface in the target Alma system. The characters you enter are encrypted.
   5. In the **Institution** field, enter the institution in which the external Alma system is located.
   6. Select the **Check item availability** check box for the profile to check whether an item is available in the institution. An item is available if it's status is **Item in Place**.
   7. Select the **Check item requestability** check box for the profile to check whether an item can be requested as part of a resource sharing request.
   8. Select **Test Connection** to check connectivity to the server. (This doesn't check the authentication parameters.)

---

**Configuring Shipping Cost Lender Rules**

To configure shipping cost lender rules, you must have one of the following roles:

- Fulfillment Administrator
- General System Administrator

Shipping cost lender rules enable you to configure the conditions under which shipping costs are applied to resource sharing lending requests.

**To configure shipping cost lender rules:**

1. On the Shipping Cost – Lender Rules List page (**Configuration Menu > Fulfillment > Resource Sharing > Shipping Cost Lender Rules**), select **Add Rule**. The Shipping Cost – Lender Rules page appears. For more information about rules tables, see **Rules Tables**.
2. Enter a name for the rule in the Name field.
3. Configure input and output parameters in the relevant fields. Configuring a shipping cost lender rule is performed in the same manner as other rule configurations in Alma (see Configuring Automatic Loan Renewal Rules).

---

Configuring Shipping Cost Borrower Rules

To configure shipping cost borrower rules, you must have one of the following roles:

- Fulfillment Administrator
- General System Administrator

Shipping cost borrower rules enable you to configure the conditions under which shipping costs are applied to resource sharing borrower requests.

To configure shipping cost borrower rules:

2. Enter a name for the rule in the **Name** field.

3. Configure input and output parameters in the relevant fields. Configuring a shipping cost borrower rule is performed in the same manner as other rule configurations in Alma (see Configuring Automatic Loan Renewal Rules).

4. Select **Save**. The shipping cost rule appears on the Shipping Cost – Borrower Rules List page.

---

**Configuring Sending Borrowing Request Rules**

To configure sending borrowing request rules, you must have one of the following roles:

- Fulfillment Administrator
- General System Administrator

Sending borrowing request rules indicate when a borrowing request is sent automatically. Any borrowing request that matches a rule for automatic sending is automatically sent to the active partner, without requiring staff intervention.


---

Sending borrowing request rules that have been distributed from a network is indicated by a check mark in the **Network Rules List** section of the page. The `network_sending_rules_precedence` parameter determines whether the network, institution, or library level rules are executed first. For more information, see Configuring Other Settings.

The following actions can be performed on this page:
- Add sending borrowing request rules (see Adding Sending Borrowing Request Rules)
- Edit sending borrowing request rules (select Edit from the row actions list)
- Duplicate sending borrowing request rules (select Duplicate from the row actions list and modify the relevant fields)
- Delete sending borrowing request rules (select Delete from the row actions list)
- Edit the Default Sending Borrowing Request Rule (select Edit from the row actions list of the default rule)
- Disable a sending borrowing request rule

**Note**
Automatic send rules are activated only following a manual or automatic locate process.

### Adding Sending Borrowing Request Rules

You can add a Sending Borrowing Request Rule.

**To add sending borrowing request rules:**


![Sending Borrowing Request Rules Page](image)

2. In the Sending Borrowing Request Rules section, enter a name in the Name field.
3. Configure input parameters in the relevant fields. Configuring a sending borrowing request rule is done in the same manner as other rule configurations in Alma (see Configuring Automatic Loan Renewal Rules). Input parameters are:
   - **Converted from Hold Request** - True or False
   - **Missing Article Metadata Fields** - Choose one or more of the metadata fields
   - **Missing Book Metadata Fields** - Choose one or more of the metadata fields
   - **Partner** - Choose one or more of the configured resource sharing partners
   - **Price** - Enter a decimal amount
Configure output parameter. The only output option is **Send Request**, which can be set to **True** or **False**. If the input value specified above is found on the request, the output parameter determines if the request is sent.

5. Select **Save**. The configured rule appears on the Sending Borrowing Request Rules List page.

When the configured rule parameters are met for a resource sharing borrowing request, the request is automatically sent after an automatic rota assignment is invoked.

---

**Note**

Adding the fields: ‘Chapter Title’ and ‘Chapter Author’ as mandatory will automatically reject any request coming from Primo that will miss this information.

---

### Configuring Patron Queries

The Query to Patron Letter is sent to the patron when a user selects Send Query to Patron on the Borrowing Requests page (**Fulfillment > Resource Sharing > Borrowing Requests**). Alma provides two systems for configuring these letters in Alma: *patron query templates* and *patron query types*.

- **Old system**: Patron query templates are a basic means of configuring patron letters. You can enter multiple letters and configure the fields in the letters. You cannot edit the initial structure of the letter, but – if configured – you can edit the letter before it is sent.

  This system is deprecated and will be removed in an upcoming Alma version.

- **New system**: Patron query types use Alma’s flexible XSL style sheet letter configuration system for each query, which is more flexible. You can define up to thirty types of letters that will be sent when a user selects to send a query to a patron, for example a welcome letter, a response to a request, and so forth.

You can configure Alma to use either patron query templates or types, but not both, using the **send_query_to_patron_use_xsl** parameter in the Customer Parameters Mapping Table. For more information, see [Configuring Other Settings](#).

---

**Note**

Patron query types are deployed by default. Patron query templates are deprecated and will be removed in a future version of Alma.

Requests are sent using the **Send Query to Patron** link beneath a resource request on the Resource Sharing Borrowing Requests page. For information, see [Peer-to-Peer Resource Sharing](#).

---

### Configuring Patron Query Templates

To configure patron query templates, you must have one of the following roles:

- **Requested Format** - Valid options are Digital, Physical, and Physical non-returnable
- **Self Ownership** - Select True or False
- **User Group** - Choose one or more of the configured user groups

- Adding the fields: ‘Chapter Title’ and ‘Chapter Author’ as mandatory will automatically reject any request coming from Primo that will miss this information.

---

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Patron query templates are configured on the Patron Query Templates mapping table (Configuration Menu > Fulfillment > Resource Sharing > Patron Query Templates). For more information about mapping tables, see Mapping Tables. Each template contains a short list of fields that are assembled to create the letter sent to the patron. The initial format of the letter is not configurable, but – if configured – the letter can be edited before it is sent.

**Note**

This option appears only when the send_query_to_patron_use_xsl in the Customer Parameters Mapping Table is set to false (see Configuring Other Settings). When send_query_to_patron_use_xsl is set to true, the Patron Query Types option appears instead (see Configuring Patron Query Types).

---

**Adding Patron Query Templates**

You can add a patron query template.

To add a patron query template:

1. Open the PatronQueryTemplates Mapping Table Page (Configuration Menu > Fulfillment > Resource Sharing > Patron Query Templates).
2. Select Add Row. Enter a name for the template in the Name field.
3. In the Subject field, enter a subject. You can use the variables %reqId% and %reqName%; these will be replaced with the borrowing or lending request’s external ID or the patron’s name, respectively.
4. In the Header field, enter a header, such as “Dear Sir/Madam:”.
5. Enter additional lines in Query Line 1, 2, and 3. These fields are substituted into the Query to Patron Letter. For more information, see Example Letter Customization: Query to Patron Letter.
6. In the Edit if Single field, enter True if the message will be open for editing, or False if the message will be sent
directly to the patron without any opportunity for editing.

7. Select Add Row. The template appears in the list of templates.

8. Select Customize.

The fields are assembled into a letter that is sent when a user selects Send Query to Patron on the Borrowing Requests page. See Peer-to-Peer Resource Sharing.

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**Configuring Patron Query Types**

To configure patron query types, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can configure types of letters to be sent to patrons using the enhanced XSL Query to Patron Letter. You can define up to thirty types of letters, for example a welcome letter, a response to a request, and so forth.

Patron query types are configured on the Patron Query Types code table (Configuration Menu > Fulfillment > Resource Sharing > Patron Query Types). For more information about code tables, see Code Tables.

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**Note**

This option appears only when the send_query_to_patron_use_xsl in the Customer Parameters Mapping Table is set to true (see Configuring Other Settings). When send_query_to_patron_use_xsl is set to false, the Patron Query Templates option appears instead (see Configuring Patron Query Templates). The Patron Query Templates option will become obsolete in the future.

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**Patron Query Types Code Table Page**

The following actions can be performed on this page:

- Add a patron query type (see Adding Patron Query Type)
- Edit a patron query type (Modify the column values in the Mapping Table Rows section)
Adding Patron Query Type

You can add a patron query type.

To add a patron query type:

1. On the Patron Query Types Code Table Page (Configuration Menu > Fulfillment > Resource Sharing > Patron Query Types), enable the relevant patron query types.

2. You can modify the enabled entries’ descriptions. Note that the Description column’s text appears in the drop-down of query types (after selecting Send Query to Patron for a Borrowing request), and the code enables you to map the exact text to be used for each query type.

3. You can select enabled entries as templates for the Send Query to Patron email, and can modify the entries on the Query to Patron Letter Code Table page (see the procedure, below).

4. Select Save when you are done.

To configure the Query to Patron letter, see Example Letter Customization: Query to Patron Letter.

Configuring Additional Requested Media

To configure additional requested media, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can expand the granularity of requested resources, enabling a digital request to be requested as an audio or visual file, or a physical request to be requested as a book or a CD. When specifying the exact format in which the resource is required, the lending library processes the request in the requested format.

The options entered in this table appear when adding a borrowing or lending request, depending on the configuration in requested media definitions; see Configuring Requested Media Definitions. Also see Creating a Borrowing Request and Creating a Lending Request.

For information about expanded granularity of requested resources, see the Greater Granularity When Specifying Requested Media video (2:57 mins).
Configuring requested media is done on the Additional Requested Media Code Table page (Configuration Menu > Fulfillment > Resource Sharing > Additional Requested Media). For more information about code tables, see Code Tables.

![Additional Requested Media Code Table Page](image)

To configure the requestable media types for resource sharing requests:

See Code Tables.

**Configuring Requested Media Definitions**

To configure requested media definitions, you must have one of the following roles:

- Fulfillment Services Operator
- Fulfillment Services Manager

You can configure attributes that pertain to the requested media types configured on the Additional Requested Media Code Table page (see Configuring Additional Requested Media). The configurable attributes indicate whether the media types are to be available when submitting borrowing and/or lending requests. You can also configure a media type to not be available for either borrowing or lending requests.

The options entered in this table appear when adding a borrowing or lending request; see Creating a Borrowing Request and Creating a Lending Request.

Configuring media type attributes is done on the Requested Media Definition Mapping Table page (Configuration Menu > Fulfillment > Resource Sharing > Requested Media Definition). For more information about mapping tables, see Mapping Tables.
To specify media types to be available when submitting a resource sharing request:

1. Open the Requested Media Definition Mapping Table page (Configuration Menu > Fulfillment > Resource Sharing > Requested Media Definition). The default requested media types display, as follows:
   - Printed
   - Photocopy
   - Microform
   - Film or video recording
   - Audio recording
   - Machine Readable
   - Any

2. In the Create a New Mapping Row section, you can add the additional media types that were configured on the Additional Requested Media Code Table page (see Configuring Additional Requested Media), as follows:
   1. In the Requested Media field, select a media type. The displayed types are those configured on the Additional Requested Media Code Table page.
   2. In the Include in Borrowing Request field, select whether the media type is to be available when submitting resource sharing borrowing requests.
   3. In the Include in Lending Request field, select whether the media type is to be available when submitting resource sharing lending requests.
   4. Select Add Row. The specified media type displays in the Mapping Table Rows table.

3. In the Mapping Table Rows table, select True or False in the Include in Borrowing Request and Include in Lending Request columns to indicate whether the specified media type is to be available when submitting borrowing requests or lending requests, respectively.

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**Note**

The Any media type must always be specified as True for both borrowing and lending requests.

Media types configured as True appear in the Requested Media field in the following places:
When creating a borrowing or lending request either manually or from a search (see Resource Sharing).

In a Ful Outgoing Email Letter, also known as a borrowing request letter, sent to a resource sharing partner when a borrowing request has an active partner of Type = Email (see Resource Sharing Requests).

In a Ful Incoming Slip Letter, also known as a print slip letter, sent when selecting the Print Slip link for a lending request (see the relevant description in the Request Sharing Lending Requests Task List Links).

In a Resource Sharing Shipping Slip Letter, sent when selecting the Ship Item link for a lending request, and ensuring that Automatically Print Slip = Yes on the resulting Shipping Items page (see the relevant description in the Lending Requests Task List Links table in Workflow Actions).

For information about the letters, see Configuring Alma Letters.

4. Optionally, select Delete to delete a media type added from the Quick Add section. You cannot delete the default media types.

Configuring Levels of Service

To configure levels of service, you must have one of the following roles:

- Fulfillment Services Operator
- Fulfillment Services Manager

You can configure the levels of service that are available for resource sharing requests on the Levels of Service page (Configuration Menu > Fulfillment > Resource Sharing > Levels of Service). For more information about code tables, see Code Tables. You can enable or disable the levels, and you can change the descriptions.

Levels of Service

After configuring the levels of service, you can set the field value in the Primo request form and the borrowing and lending requests. The field also appears on the resource sharing task lists (Creating a Borrowing Request) and when creating lending and borrowing rules (Configuring Shipping Cost Lender Rules and Configuring Shipping Cost Borrower Rules).

For more information on Levels of Service, see the Level of Service for Resource Sharing Requests video (3:21).
Mapping Alma Library Codes to External Library Codes for Libris ILL

To configure requested media definitions, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can map Alma library codes to library codes in external resource sharing systems. This mapping table can be used in conjunction with the resource sharing integration profile. This enables customers using Libris ILL to map their pickup library codes to Alma codes so that resource sharing requests can be imported into Alma from Libris. Access the Library mapping table (Configuration Menu > Fulfillment > Resource Sharing > Library Mapping). For more information about mapping tables, see Mapping Tables.

Enter the external library code and its corresponding Alma library code.

![Library Mapping](image)

Configuring Brief Audit Fields

To configure brief audit fields, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can configure which audit lines will be visible in the resource sharing requests History tab on the Brief Audit Fields code table (Configuration Menu > Fulfillment > Resource Sharing > Brief Audit Fields). For more information about code tables, see Code Tables. You can enable or disable each field. See Managing Resource Sharing Borrowing Requests and Managing Resource Sharing Lending Requests.
To configure resource languages, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can enable or disable languages that appear in the Language drop down in the Request Attributes section of a resource sharing request, indicating the desired language of the item being requested. See Managing Resource Sharing Borrowing Requests and Managing Resource Sharing Lending Requests.

Access the Resource Languages page (Configuration Menu > Fulfillment > Resource Sharing > Resource Languages). For more information about code tables, see Code Tables. You can enable or disable a language, reorder the languages, or edit the name of the language.
Configuring Item Policy Exceptions

To configure item policy exceptions, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can configure an item policy exception that indicates that the item should not be shipped for a resource sharing request. Access the Item Policy Exceptions mapping table (Configuration Menu > Fulfillment > Resource Sharing > Item Policy Exceptions). For more information about mapping tables, see Mapping Tables. For more information about item policies, see Configuring Item Policies.

An item policy may be added with the exception set to either True or False. Setting the policy to True will create the item policy exception, which means it will be unavailable for resource sharing. Setting the item policy exception to False means that no exception will be created and the item will continue to be available for resource sharing as previously. The Format may be set to Both, Digital, or Physical. The format is validated when a resource sharing request is created and the item policy exception validation is selected.

Configuring Primo Request Form Type by Genre

To configure the Primo request form type by genre, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can map the OpenURL genre field value to the Primo resource sharing request type selected. By default, Primo opens the request form with book selected by default; the other option is article. Access the Request Form Type by Genre mapping table (Configuration Menu > Fulfillment > Resource Sharing > Request Form Type by Genre). For more information about mapping tables, see Mapping Tables.
In the quick add section, add the value that appears in the OpenURL genre field. Then select either Article or Book and Add Row. Rows may be enabled or disabled by selecting on the Enabled checkmark.

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**Configuring Borrowing Request Inactive Filters**

To configure the borrowing request inactive filters, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

In order to filter statuses out of the Active display in the Borrowing Requests Task List, access the Borrowing Requests Inactive Filters code table (Configuration Menu > Fulfillment > Resource Sharing > Borrowing Requests Inactive Filters). For more information about code tables, see Code Tables.

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**Borrowing Request Inactive Filters**

Enabling a row means that it appears on the drop-down filter in the borrowing requests task list and it is removed from the display of Active records in the task list. Moving the rows up or down impacts the order in which they appear in the list of the drop-down filter.
Configuring Borrowing Request Statuses

To configure the borrowing request statuses, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

In order to customize the description and translation text of borrowing request statuses, access the Borrowing Request Statuses code table (Configuration Menu > Fulfillment > Resource Sharing > Borrowing Request Statuses). For more information about code tables, see Code Tables.

This page enables you to define the borrowing request's status text that will be displayed in Primo and in the requests list in the Alma patron services page.

![Borrowing Request Statuses](image)

Configuring Request Reject Reasons

To configure the request reject reasons, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

In order to customize the description and translation text of request reject reasons, access the Automatic Locate Reject Reasons code table (Configuration Menu > Fulfillment > Resource Sharing > Automatic Locate Reject Reasons). For more information about code tables, see Code Tables.

This page enables you to define the request's reject text that will be displayed in Primo and in the requests list in the Alma patron services page.
Configuring Renew Reject Reasons

To configure the renew reject reasons, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

In order to customize the description and translation text of renew reject reasons, access the Automatic Renew Reject Reasons code table (Configuration Menu > Fulfillment > Resource Sharing > Automatic Renew Reject Reasons). For more information about code tables, see Code Tables.

This page enables you to define the request's renewal rejection text that will be displayed in the Full Borrowing Info letter (code: FulBorrowingInfoLetter) when it is sent to the patron.