



# Resource Sharing: Tips & Tricks for Migration to Alma

Alma Workshop, Haifa, 13.12.16

**Dr. Lynne Porat**

**Head, Interlibrary Loans & Assessment**

**porat@univ.haifa.ac.il**



## Main Issues

- **Learning Alma**
- **Policy Changes**
- **Configuration**
- **Staff Training**



# Learning Alma: Sandbox

**ExLibris  
Alma**

Alma November 2016 Release:  
**Great Inventions  
Around the Alma World**  
Sweden - Gustaf Eric Pasch  
The safety match

THREE STARS  
SAFETY MATCHES

User Name:

Password:

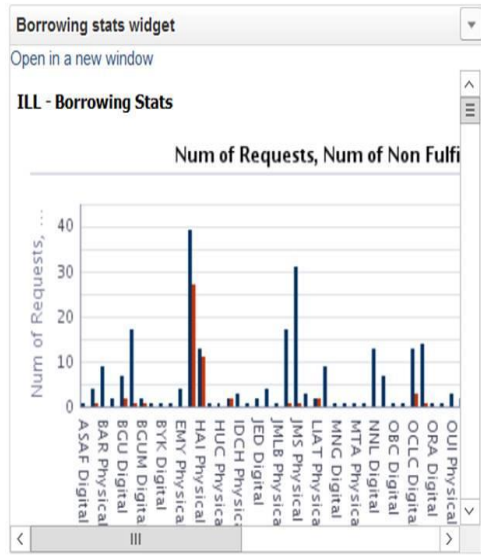
Login



# Online Help

**Tasks**

- Electronic resources - activation - unassigned (43)
- Electronic resources - activation - passed due date - unassigned (17)
- Invoices - review - without assignment (791)
- Order Lines - review - unassigned (6598)
- Orders - review (3)
- Order Lines with claims (1882)
- Order Lines - waiting for renewal (143)
- Requests - All - pickup from shelf (1)
- Borrowing requests - New - with no partner (6)
- Borrowing requests returned by patron (1)
- Borrowing requests - Overdue (1)
- Borrowing requests recalled (4)
- Lending requests - Overdue - unassigned (22)
- Lending requests - Recalled - unassigned (39)
- Reading lists - unassigned (15452)



**Lending invoices widget**

Open in a new window

**ILL - Lending Invoices**

External Request Id	Item Sent Date	Shipping Cost	Req Form	Notes
AFU168446341	10/26/2016 8:51:57 AM	40	Phys	
AHV13782	10/26/2016 9:01:02 AM	40	Phys	
AHV13805	10/27/2016 12:06:55 PM	40	Digital	Instance Name: EU01
AHV13817	11/10/2016 2:15:34 PM	40	Digital	Specialeducation today in Israel
AHV13820	11/10/2016 1:43:39 PM	40	Digital	Enduring issues in special education : personal perspectives /
AHV13848	11/29/2016	40	Digital	תחומי חקר פורט

- Browse Online Help
- Help For This Page
- What's New Videos
- Hide 'Show Me How'
- Alma Release Schedule
- Suggest an Idea
- Generate Tracking ID
- December 2016 Release
- Instance Name: EU01



**Scheduled Jobs Status**

Name	10/12	09/12	08/12	07/12	06/12
Acquisition	✓	✓	✓	✓	✓
Data services	-	✓	✓	✓	✓
Fulfillment	!	!	!	!	!
Import	-	-	-	-	-
Repository	!	!	!	✓	✓
Users	✓	✓	✓	✓	✓

PowerPoint 2013



# Knowledge Center: Training Videos



[Training](#) | [Documentation](#) | [Knowledge Articles](#) | [Developer Network](#)

How can we help you?

Home » Alma » Training » Extended Training

## Resource Sharing

**This course includes the following sessions:**

- Resource Sharing
- Resource Sharing ARTEMail and Email
- Resource Sharing Concepts
- Resource Sharing Process Demonstration

**Course Duration:**

3 hours



# Alma Academy & Conference Calls

The screenshot shows a YouTube video player interface. At the top left is the YouTube logo and a search bar. The video content displays a man in a blue and grey striped shirt speaking at a podium. To his right is a presentation slide titled "TOU Rules". The slide features a central icon of a university building, with arrows pointing to a person icon, a book icon, and three document icons labeled "TOU". Above the building icon is a close-up image of a wooden gavel resting on an open book. The video player controls at the bottom show a progress bar at 1:21:00 / 1:58:18, a volume icon, and a settings icon. The ExLibris logo is visible in the bottom right corner of the video frame.

Fulfillment and Resource Sharing: Part 1



# Basecamp

Basecamp 2 | Projects | Calendar | Everything | Progress | Everyone | Me

Help

972HAI- Alma & Primo Project  
Last updated on Sep 20

Starred Project

ALL PROJECTS A-Z

0-9      ★ 972HAI- Alma & Primo Project

A      Alma Resource Sharing UK



# Sample Questions


Basecamp 2 | Projects | Calendar | Everything | Progress | Everyone | Me |


Searching for **sharing**

All matches by anyone in this project ([search all projects](#)).

---


August 16

 **Re: RS Lending - Analytics**  
...pped Digitally) does not delete the request or remove it from Analytics. By default, Completed requests are not displayed in the list of Resource **Sharing** requests in Alma. However, you can view them by changing the Activity Status filter (upper left corner) to "All" or "Completed". Best Regards, Sh...  
Project: 972HAI- Alma & Primo Project

 **Re: RS Borrowing - patron costs**  
...is received at the library. These fees can be assessed 'automatically' according to the new (July 2016) policies in the Borrowing TOU: Resource **Sharing** Request Fee and Resource **Sharing** Receive Fee. These fees can also be assessed/overridden in the Borrowing Request form itself. Best Regards, Shmuel  
Project: 972HAI- Alma & Primo Project


---

July 14

 **Resource Sharing Lending Reject Letters**  
Lynne Porat – Hi Shmuel, When we press Reject within the request to send a RS Lending reject letter (to a non-ISO/Alma partner) the message is not sent by email; and the status is not updated to Rejected Borrower Request. However, when we manually update the status to Rejected Borrowe...  
Project: 972HAI- Alma & Primo Project

---

July 13

 **Resource Sharing Borrowing Reject Letters**  
Lynne Porat – Hi Shmuel, When we send Reject letters from the RS drop down menu such as Lost, Non-Circulating etc... the same Cancellation Letter is sent even though we choose different reasons. It seems to be sending Ful Cancel Request Letter which is a standard cancellation letter f...  
Project: 972HAI- Alma & Primo Project





# Release Notes & Road Map

## Managing Lending Invoices

### Resource Sharing

#### Customer Value

- Library will enjoy better tracking of costs associated with shipping resource sharing items, by being able to trigger invoices from within Alma

#### Feature Highlights

- It will be possible to trigger invoices for shipped resources. The invoices will be aggregated and will be reportable in the system.

# Alma Users

- Send **Emails** to Alma users abroad
- Follow **Alma-L/Alma UK Resource Sharing Listservs**

LISTSERV 16.0 ?  
 Subscriber's Corner Email Lists Preferences Log Out



ALMA-L Home Page

**ALMA-L@LISTSERV.ND.EDU** LISTSERV Archives

Latest Messages		
Re: Cash handling at service desks	Justine Bennett <Justine.Bennett@UL.IE>	Tue, 22 Nov 2016 12:15:08 +0000
Cash handling at service desks	Anne.McMahon <Anne.McMahon@UL.IE>	Tue, 22 Nov 2016 11:54:16 +0000
Re: global updates to location codes	Sian Thomas <sian.thomas@LLGC.ORG.UK>	Tue, 22 Nov 2016 10:51:29 +0000

**ALMA-L** Hide Latest Messages

Discussion list for Ex Libris' Alma Library System

*Purpose : Purpose: This list is for the discussion of Ex Libris' Library Management System, Alma.*

- November 2016
- October 2016
- September 2016
- August 2016
- July 2016
- June 2016
- May 2016
- April 2016
- March 2016
- February 2016

**Search Archives**

Advanced Options

sharing

---

**Options**

- Log Out
- Change Password

---

- Search Archives

---

- Subscribe or Unsubscribe
- Post New Message
- Newsletter Templates

---

- Preferences






# Ideas Exchange



[Ex Libris](#) [Knowledge Center](#) [Contact Support](#) [Developer Network](#)

Have an idea for Ex Libris?

-  Share your ideas
-  Support your favorite ideas
-  Get feedback on popular ideas

Welcome to Ex Libris Idea Exchange! ***We'd love to hear your ideas for us.***  
To suggest an idea, please select one of the following forums




[ideas.exlibrisrouo.com/forums/308176-primo](https://ideas.exlibrisrouo.com/forums/308176-primo)



# Sample Ideas

## How can we improve Alma?

 You've used all your votes and won't be able to post a new idea, but you can still search and comment on existing ideas. [More info...](#)

Enter your idea

Hot

Top

New

Resource Sharing (22)

Status

My feedback

41

votes

1 vote

### Include Fulfillment Notes when Shipping items in Resource Sharing

It would be nice if pop-up fulfillment notes on an item record were attached to a resource sharing request when an item is shipped, much like the barcode currently does. So if a damaged book has a note saying "Underlining noted," that note would attach to the request record so that the borrowing institution could see it. This would make it easier for the people processing on either end to know whether an item shipped with damage, or a set shipped with a certain amount of items, etc.

1 comment · Resource Sharing · [Flag idea as inappropriate...](#)

35

votes

3 votes

### Producing the shipping forms by supplier

Each time a request has been marked "Ship" or "Return", the request details will be collected on a "Shipping Form" (by supplier).

When ready to ship a package -with returned/requested books- to another library, "print form" will:

1. Produce a full detailed form to include with the box
2. Will start a new form for future package.

2 comments · Resource Sharing · [Flag idea as inappropriate...](#)



# Policy Changes

- **Loan period:** Six weeks for patrons and partners
- **Renewals:** None
- **Resource Sharing Fee:** One fee for all request Types and User Groups
- **ILL requesting via Primo:** enabled for Non-owned, Loaned and Non-Circulating items
- **Patron Renewals/Cancellations** disabled on Primo Library Account

# Configuration: Borrowing

## Obligatory:

- Check Partners' details/Test communication
- Workflow Profiles
- Terms of Use (TOU) of Loan Periods/No Renewal/Recalls/Overdues
- Opening Hours for Resource Sharing Library
- Patron Query Types
- Resource Sharing Fee

## Non-Obligatory:

- Shipping Cost Borrowing Rules
- Locate Profiles
- Rota Templates



# ILL form in Primo

- Customize **stand-alone** ILL form in Primo
- Check ILL form with **Discovery Tools:**  
Primo Central/EDS/Google Scholar

# Requesting via Link Resolver



ONESEARCH

Fiction and fatalism

Crook, Isaac

Methodist Review , 1905, Vol.87, p.438

[Full Text](#)

[Details](#)

[Where in the Library / Inter-Library Loan](#)

[Open source in a new window](#)

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

[Inter-Library Loan for a fee](#)

Having problems? Please contact the staff [reference@univ.haifa.ac.il](mailto:reference@univ.haifa.ac.il)





# Autofill of ILL form

## Fiction and fatalism

Crook, Isaac

Methodist Review , 1905, Vol.87, p.438

[Full Text](#) [Details](#) [Where in the Library / Inter-Library Loan](#)

[Open source in a new window](#)

### Resource information:

Citation type:

Book or Book Chapter  Article

Journal title:\*

Methodist Review

Publication date:\*

1905

Volume:\*

87

Issue:

Article title\*

Fiction and fatalism

Author (Last name, first name):\*

Crook, Isaac

Scan start page:\*

438

Scan end page:\*

442

ISSN:

1946-5254

### Delivery Information:

Format:\*

Physical  Digital

Comment (PDF file only, salary debit, urgency...):

Budget Number: (ILS)

Copyright:\*

אני מצהיר/ה בזאת כי הפרוט המבוקש ▲



# Configuration: Lending

## Obligatory:

- **Terms of Use (TOU)** Loan period/No renewals/Recalls/Overdues
- **Shipping Cost Lending Rules**
- **Workflow Profiles**

## Recommended:

- **Disable Auto-Assign** of Lending requests



# Staff Training

- Acknowledge the different ways of dealing with change e.g. oppose/ignore/embrace
- Free staff from regular tasks to **watch videos**
- Demonstrate Alma to staff members & give **hands-on activities**
- Make sure they **read guide** and **practice workflows**



# Saving files from Aleph

## Obligatory:

- Items On Shelf/Sent to Supplier/On Loan

## Recommended:

- Closed requests
- Suppliers' details
- Statistics (Supplier/Material Type/% Fill Rate/Av. Delivery Time)
- Income/Expenses



# General Tips

- **Currently at:** Resource Sharing Desk/Circulation Desk/Digitization Dept.
- **Facets:** Active requests displayed, Completed requests search by keyword
- **Scan-in:** many functions e.g. Transfer to Hold Shelf, In Transit, Re-Shelve and Return
- **Back:** do not press on Browser - must press Cancel/Done/Back/Exit on Alma to get to previous screen



## General Tips cont.

- **Slips/Letters:** are sent to a departmental email (depending on **Currently at:**) and must be printed/forwarded/deleted from there
- **Reports:** can be printed at departmental printer or sent to an email account



# General Tips cont.

## Borrowing:

- **Firefox:** Open Alma with different browser to work on Fulfillment AND RS at same time
- **Payment Vouchers:** print using **Ctrl-P** (Print Page)
- **Statistical & Financial reports:** use **Analytics**



## General Tips cont.

### Lending:

- **Active** requests are arranged by **title** of book or article (not journal)!
- **Digital** requests: print using **Ctrl-P** so that article title appears
- **Invoices:** use Analytics



# Alma Timeline

## 10 months-

- Make **list of current ILL processes**
- Help prepare **Migration** form
- Start experimenting with **Sandbox**

## 9 months-

- Help configure **Sandbox** and **Prod**
- Define user **Roles**
- Correspond with **Implementation Team (via Basecamp)**



# Alma Timeline cont.

<b>8 months-</b>	<b>➤ Alma Academy</b> Participate in: General, Fulfillment/RS and Analytics sessions
<b>3 months-</b>	<b>➤ Alma Functional Workshop</b>



# Alma Timeline cont.

## 1 month-

- **Recall** all loaned items
- **Train** staff
- Check **display** of Borrowing requests in Patron's **Library Account** and **Loaned Lending** items in Primo

## 2 weeks-

- Cease processing **new requests**
- Send **email notification**
- **Issue invoices**

# Alma Timeline cont.

## Go Live

- Update links to **Primo ILL form** on website
- Update links to **ILL prices** on website/print ILL forms
- Change text on **Loan Slips** (6-week loan)

## After Go Live

- Correspond with **EXL Support** via **Salesforce** cases
- Change workflows based on **monthly releases**



# Remember!

- **Don't expect everything to run smoothly**  
- there will still be many surprises after  
**you Go Live**
- **With creativity, patience & perseverance**  
**you will find solutions to problems**



# Lastly



© Can Stock Photo - csp16357344