



# IGeLU & Ex Libris

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## Resource Sharing Models

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# Agenda

1

Existing Models

2

Peer to Peer (P2P) Workflow

3

Broker Workflow

4

Some Roadmap Highlights

5

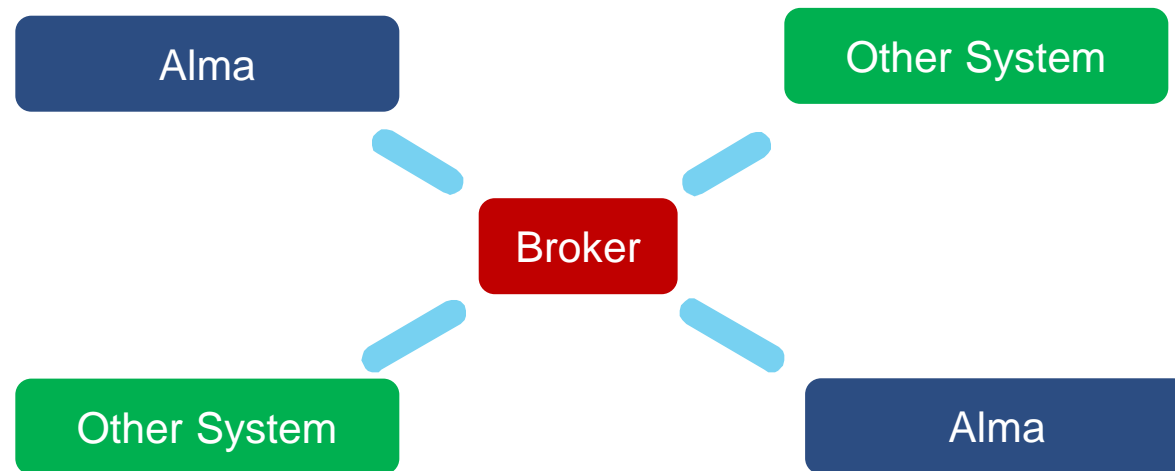
Summary



## Existing Models

Resource Sharing the way you like it

# Broker Model



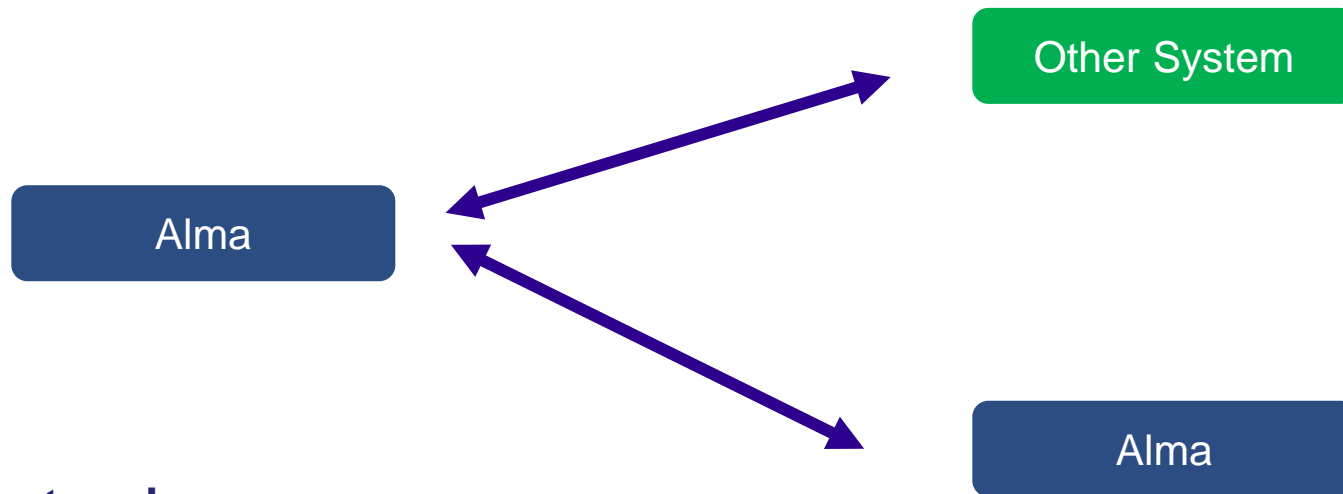
## Systems:

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

## Protocols:

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

# Peer to Peer Model



## Protocols:

- ISO ILL
- BLARTEmail
- Emails

## Peer to Peer Workflow

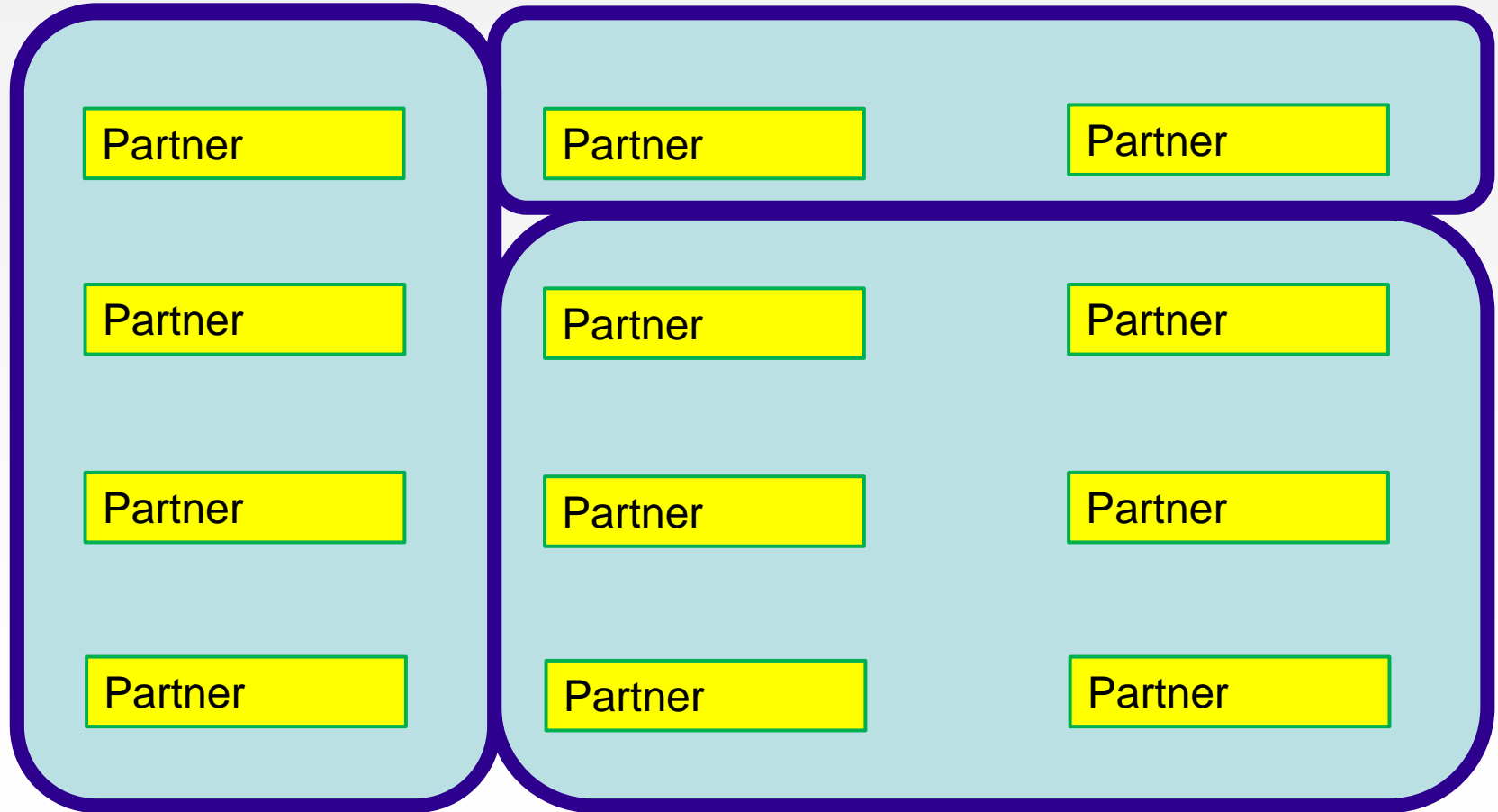
- Data Elements and Infrastructure
- Request Placement
- Fulfillment Options

## Peer to Peer Workflow

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

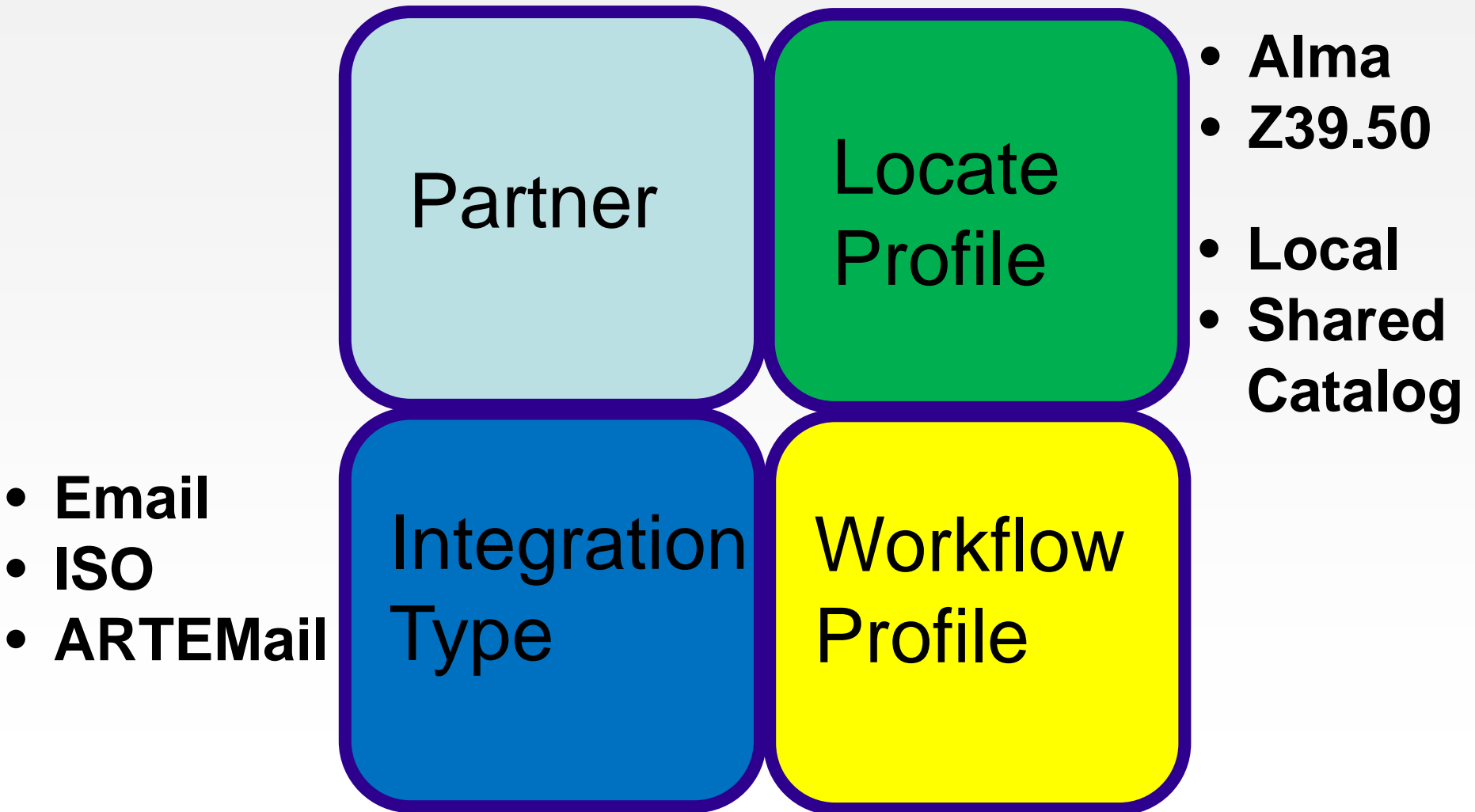
# Alma Data Elements and Infrastructure

## Rota Templates

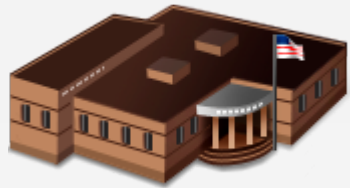




# Alma Data Elements and Infrastructure



# Alma Data Elements and Infrastructure



Borrower Institution



Request

Temporary Item

Loan



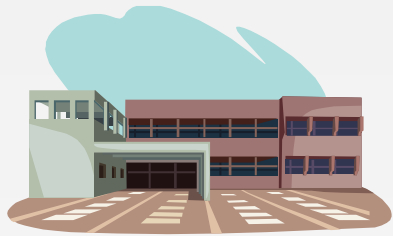
Rota

Partner	Locate Profile
Integration Type	Workflow Profile

Partner	Locate Profile
Integration Type	Workflow Profile

Partner	Locate Profile
Integration Type	Workflow Profile

# Alma Data Elements and Infrastructure



Lender  
Institution



Request

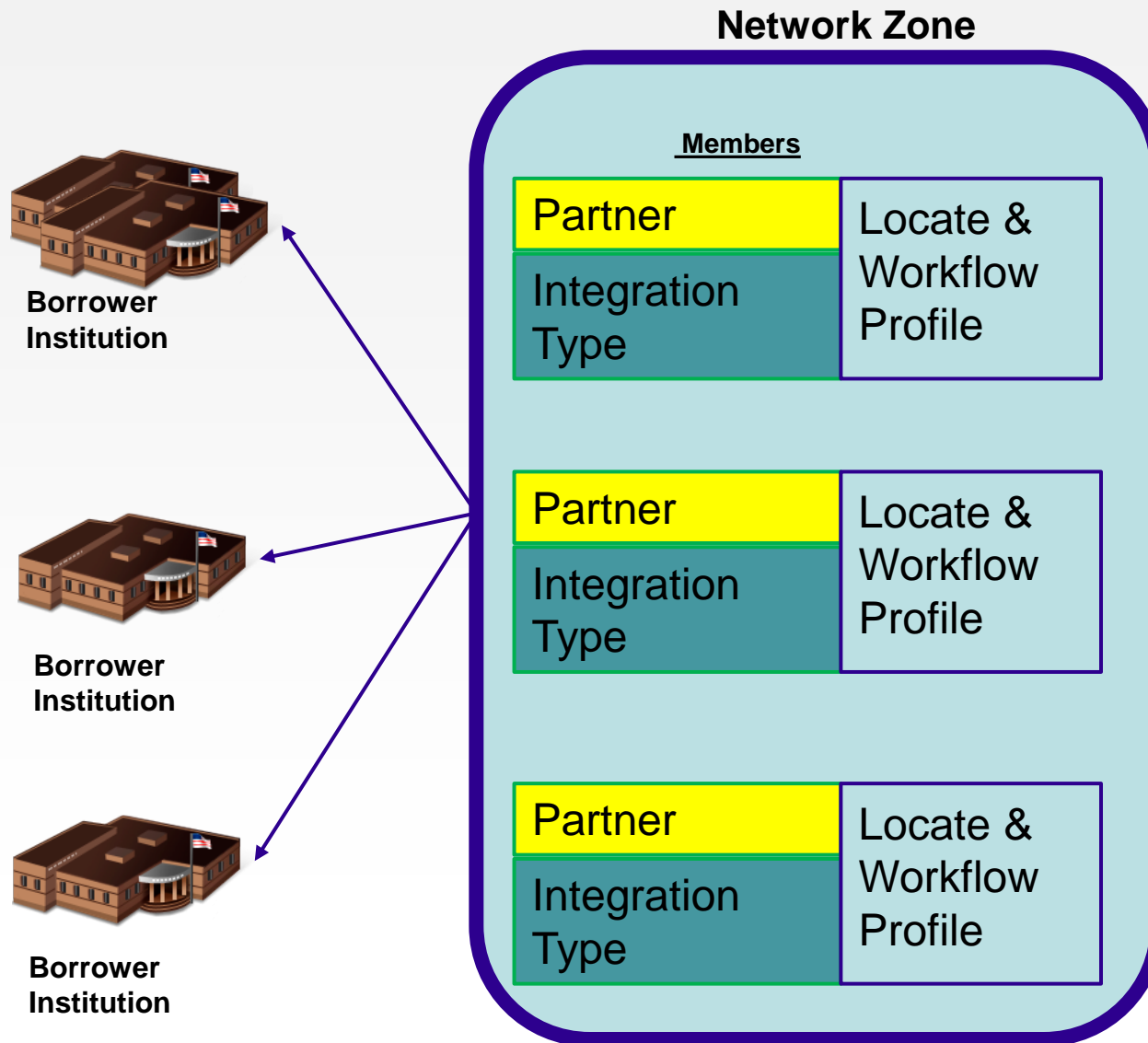
Item Moved to  
Temporary  
Location

Partner

Integration  
Type

Workflow  
Profile

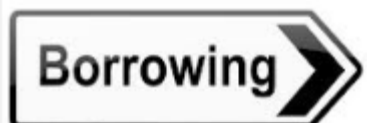
# Alma Data Elements and Infrastructure



## Peer to Peer Workflow

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

# Request Placement



**Citation Linker**

Journal    Article    **Book**

Book Title:

Date (YYYY-MM-DD):

Volume:

Part:

ISBN:

Author Last Name:

Author First Name:

Author Initials:

Publisher:

Publication Date:

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

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

[View in a new window](#)

No full text available

[Place Resource Sharing Request](#)

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

**Boston College Libraries**

Resource Sharing Request:

Resource Information:

Citation type:  Book  Article

Title:\*

Author (Last name, first name):

Author initials:

ISBN:

Publisher:

Publication date:

Place of publication:

Additional Author (Last name, first name):

Volume:

Part:

Direct Link



# Resource Sharing in Alma



# Request Placement



**Resource Information**

Article/Chapter Title \* Ethical Plani

Journal Title The Western

Author Shelby Som

Volume

Author Initials

Issue February/Ma

ISSN 0279-0602

**Request Attribute**

Title The Western planner.

Requester \* Implementer, Ex Libris

Owner Resource Sharing Library

Partner University of Washington

Request Status Ready to be sent

External Identifier

Requested Format Physical

Allow Other Format

Preferred Send Method

Needed By

Delivery Location  Deliver to library  Alternative address

Pickup At \* Eugene

Shipping Cost  USD

Willing to Pay

Agree to Copyright terms \*

Needs patron information

Request Note





# Locate and Rota Management



Alma QA

Tasks Analytics Currently at Res

Rota

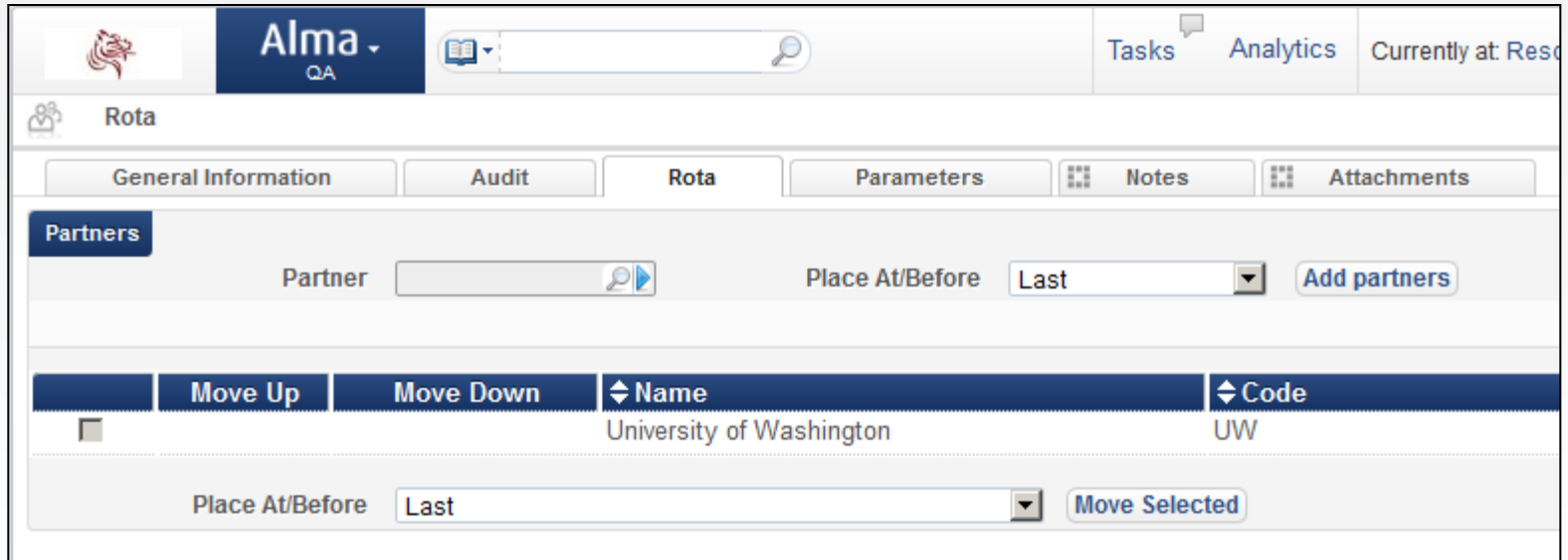
General Information Audit Rota Parameters Notes Attachments

Partners

Partner  Place At/Before Last

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

# Locate and Rota Management



The screenshot shows the Alma Rota Management interface. At the top, there is a navigation bar with the Alma logo and a search bar. Below this, the 'Rota' section is active, showing a tabbed interface with 'General Information', 'Audit', 'Rota', 'Parameters', 'Notes', and 'Attachments'. The 'Partners' tab is selected, displaying a form with a 'Partner' field, a 'Place At/Before' dropdown set to 'Last', and an 'Add partners' button. Below the form is a table with columns for 'Move Up', 'Move Down', 'Name', and 'Code'. The table contains one entry for 'University of Washington' with code 'UW'. At the bottom, there is another 'Place At/Before' dropdown set to 'Last' and a 'Move Selected' button.

# Lender Receives the Request



**W** Alma QA  Tasks Analytics Currently at Resource Sharing Library - ...

Resource Sharing Lending Requests Task List Cancel Being Processed

Limit results to:

- Status
  - [Created lending request \(1\)](#)
  - [Locate failed \(1\)](#)
- Active Partner
  - [Pacific University \(2\)](#)
- Requested Format
  - [Physical \(2\)](#)
- Supplied Format
  - [Undefined \(2\)](#)
- Due date

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

[Add](#)

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

Select All

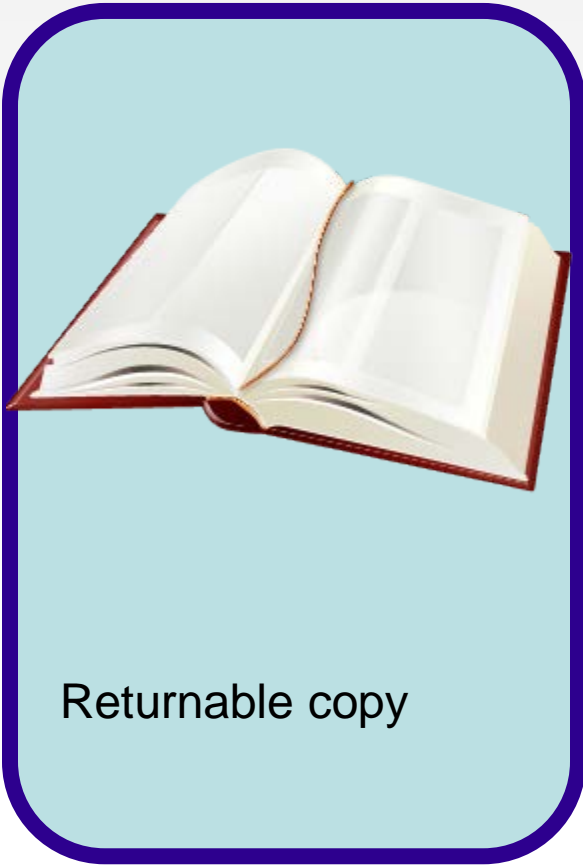
1  [The Western planner.](#)  
**Article** (Terry, Mont. : The Western Planner Vol. 1, no. 1 (Jan.-Feb. 1980)-)  
ISSN: 0279-0602 0279-0602  
**Subject:** Periodicals. -- United States, West. -- Regional planning. and others  
**Availability:** Physical version at **builtenv: beper; HT392.5.W4 W4** from:v.33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

## Peer to Peer Workflow

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

# Alma Resource Sharing

Request may be fulfilled in a number of formats:



Returnable copy



Digital copy



Non Returnable copy

# Lending Request is Created



ExLibris Alma

Tasks Currently at: Oregon Health and Science ...

Resource Sharing Lending Requests Task List Cancel Being Processed Change Status

Limit results to:

- Status
- Created lending request (1)
- Active Partner
- George Fox University (1)
- Creation Date
- Today (1)
- Update Date

Assigned to Me Unassigned

Add

Select All

1  [A short history of Australia / by Ernest Scott.](#)  
**Book** By Scott, Ernest, (London : Oxford University Press c1936.)  
**Availability:** Physical version at **MAIN: main; DU112 .S4 1936** (1 copy, 1 available) ←  
**External Identifier:** 1//TRINTEGRATION0008632  
**Request Status:** Created lending request  
**Resource Locate Status:** Resource Located  
[Edit](#) | [Manage Fulfillment Options](#) | [Duplicate](#) | [Reassign](#) | [Search](#) | [Detach from MMS](#) | [Reject](#) | [Print Slip](#) | [Ship non-returnable](#) | [General Message](#)

←

# Resource is Requested for Shipment



ExLibris Alma

Manage Resource Options

Title: - Author: Scott, Ernest, Sir, 1868-1939.  
Alerts: -

Electronic Services

No records were found.

Digital Services

No records were found.

Physical Services

1 - 1 of 1 Records Tools

Library	Location	Call Number	No. of Items	Available	Actions
Main Library	Main	DU112 .S4 1936	1	1	

No records were found.

Cancel Remove Alerts Place Request



# Resource is Requested for Shipment



ExLibris Alma

Create Request

Create Request

Title A short history of Australia /

Institution Training and Integration

Request/Process Type \*

- Ship digitally
- Ship physically

ExLibris Alma

Create Request

Create Request

Title A short history of Australia /

Institution Training and Integration

Request/Process Type \* Ship physically

Note

To \* Oregon Health and Science

Additional Request Attributes

Destination Locations UNASSIGNED location

Add Request Attributes

Call Number Type Refresh Values >

Library of Congress classification Add Request Attribute



# Resource is Shipped



ExLibris Alma Tasks Currently at: Oregon Health and Science - ...

Scan In Items

Scan in Items Change Item Information

Scan in Items

Automatically Print Slip  No  Yes

External Identifier  No  Yes

Scan item barcode \* 95933

Scan Request ID

ExLibris Alma Tasks Currently at: Oregon Health and Science - ...

Scan In Items

Scan in Items Change Item Information

Scan in Items

Automatically Print Slip  No  Yes

External Identifier  No  Yes

Scan item barcode \*

Scan Request ID

Activated	Title	Destination	Request/Process Type	Requester
<input checked="" type="checkbox"/>	A short history of Australia /	System - George Fox University Request - 1//TRINTEGRATION0008631	-	-

# Item & Request at Lender side



ExLibris Alma 95933 Tasks Currently at: Oregon Health and Science -...

Repository Search

Find Physical items where Keywords contains 95933 Go [Advanced search](#) [Saved](#)

Institution Community

Limit results to:

Item Material Type Primary Sort by Rank Secondary Sort by Rank

---

ExLibris Alma Tasks Currently at: Oregon Hea

Resource Sharing Lending Requests Task List

Temporary Location: UNASSIGNED location

Limit results to:

- Status
  - [Shipped Physically \(1\)](#)
- Active Partner
  - [George Fox University \(1\)](#)
- Requested Format
  - [Physical \(1\)](#)
- Supplied Format
  - [Physical \(1\)](#)
- Due date
  - [In the Future \(1\)](#)
- Last Interest Date
  - [Undefined \(1\)](#)

Assigned to Me Unassigned

Add

Search limited to: Creation Date: Today X

Select All

1  [A short history of Australia / by Ernest Scott.](#)  
**Book** By Scott, Ernest, (London : Oxford University Press c1936.)  
**Availability:** Physical version at **MAIN: main; DU112 .S4 1936**  
Physical version at **OHS: UNASSIGNED; DU112 .S4 1936** (1 copy, 0 available)  
Barcode: 95933  
External Identifier: 1/TRINTEGRATION0008631  
Request Status: Shipped Physically  
Resource Locate Status: Resource Located  
Alerts: Citation Move Request Completed  
Citation Move Request In Process  
[Edit](#) | [Manage Fulfillment Options](#) | [Duplicate](#) | [Reassign](#) | [Release Assign](#) | [Print Slip](#)

ExLibris

# Borrower Request Status



ExLibris Alma

Tasks Currently at George

### Resource Sharing Borrowing Requests

Limit results to:

- Status
  - [Shipped Physically \(1\)](#)
- Active Partner
  - [Oregon Health and Science \(1\)](#)
- Creation Date
  - [Today \(1\)](#)
- Update Date
  - [Today \(1\)](#)
- Requested Format

**Add**

Select All

1  [A short history of Australia /](#)  
**Book** By Scott, Ernest, (Oxford University Press c1936.)  
External Identifier: TRINTEGRATION0008631  
Partner: Oregon Health and Science  
Requester: George Fox , User   
Request Status: Shipped Physically  
Due date: 09/07/2014  
Pickup At: Main Library  
Creation Date: 12/06/2014  
[Edit](#) | [Duplicate](#) | [Send](#) | [Send query to patron](#) | [Receive](#) | [General Message](#)

# Borrower Receive



ExLibris Alma

Tasks Currently at: George Fox University - GFU

Scan In Items

Scan in Items Change Item Information

Scan in Items

Automatically Print Slip  Yes  No

External Identifier  Yes  No

Work Order Type

Scan item barcode \*  OK

Scan Request ID TRINTEGRATION0008631 OK

Create Item

Title A short history of Australia /

External Identifier TRINTEGRATION0008631

Please fill in temporary barcode \* RS-TRINTEGRATION0008631

Item policy

Location UNASSIGNED location

Fulfillment note

Due Date 09/07/2014

Cancel Save



# Item & Request Status



ExLibris Alma  Tasks Currently at: George Fox University - GFU...

Repository Search

Find  where  contains

Institution

Limit results to:

- Item Material Type
- Book (1)
- Library
- George Fox University (1)
- Process Type
- Transit (1)

Primary Sort by  Secondary Sort by

1 [A short history of Australia / by Ernest Scott.](#)  
**Book** By Scott, Ernest, (London : Oxford University Press c1936.)  
Update Date: 12/06/2014  
Library: George Fox University Process type: [Transit](#) To Library: Main Library Expected Arrival Time: 16/06/2014 Permanent Location: UNASSIGNED location  
Call Number Type: Dewey Decimal classification

ExLibris Alma  Tasks Currently at: George Fox University - GFU...

Resource Sharing Borrowing Requests

Limit results to:

- Status
- Physically received by library (1)
- Active Partner
- Oregon Health and Science (1)
- Creation Date
- Today (1)
- Update Date
- Today (1)
- Requested Format

Select All

1  [A short history of Australia /](#)  
**Book** By Scott, Ernest, (Oxford University Press c1936.)  
External Identifier: TRINTEGRATION0008631  
Partner: Oregon Health and Science  
Requester: George Fox, User   
Request Status: Physically received by library  
Barcode: [RS-TRINTEGRATION0008631](#)  
Due date: 09/07/2014  
Pickup At: Main Library  
Creation Date: 12/06/2014  
[Edit](#) | [Duplicate](#) | [Send](#) | [Send query to patron](#) | [Return](#) | [General Message](#)



# Request at Lender Side



ExLibris Alma

Tasks Currently at: Oregon Health and Science -...

Resource Sharing Lending Requests Task List

Being P...

Limit results to:

- Status
- Received by partner (1)
- Active Partner
- George Fox University (1)
- Creation Date
- Today (1)
- Update Date
- Today (1)
- Requested Format
- Physical (1)

Assigned to Me Unassigned

Add

Select All

1  [A short history of Australia / by Ernest Scott.](#)  
**Book** By Scott, Ernest, (London : Oxford University Press c1936.)  
**Availability:** Physical version at **MAIN: main; DU112 .S4 1936**  
Physical version at **OHS: UNASSIGNED; DU112 .S4 1936** (1 copy, 0 available)  
Barcode: 95933  
External Identifier: 1//TRINTEGRATION0008631  
Request Status: Received by partner  
Resource Locate Status: Resource Located  
Alerts: Citation Move Request Completed  
Citation Move Request In Process  
[Edit](#) | [Manage Fulfillment Options](#) | [Duplicate](#) | [Reassign](#) | [Search](#) | [Detach from MMS](#) | [Release Assign](#) | [Print Slip](#) |

# Loan to Patron



ExLibris **Alma**   Currently at: Main Library - Default Circ...

Scan In Items

**Scan in Items**

Automatically Print Slip  Yes  No

Work Order Type

Scan item barcode \*

Scan Request ID

Activated	Title	Destination	Request/Process Type	Requester
<input checked="" type="checkbox"/>	<a href="#">A short history of Australia /</a>	On Hold Shelf	Patron physical item request	George Fox , User

ExLibris **Alma**   Currently at: Main Library - Default Circ...

Patron Services

Patron George Fox , User  
ID [GFU\\_USER](#)  
User group Staff  
Active balance [0.00 USD](#)  
[Edit Info](#) [Send Activity Report](#)

**On Hold Shelf Items**  
User has 1 item(s) waiting for pickup at George Fox University library

Scan item barcode \*

Loan Display

Title	Due Date	Barcode	Fine	Loan Date	Loan Status	Item Policy	Library
<input type="checkbox"/> <a href="#">A short history of Australia /</a>	09/07/2014 23:59:59 EDT	<a href="#">RS-TRINTEGRATION...</a>	-	12/06/2014	Normal	-	George Fox University

# Patron Return



ExLibris **Alma**   Tasks Currently at: Main Library - Default Circ...

Manage Item Returns

Scan item barcode \*   Return Date: -

Title	Return Date	Due Date	Barcode	Loaned Date	Patron	Next Step
A short history of Australia /	12/06/2014	09/07/2014 23:59:59 EDT	RS-TRINTEGRATION0008631	12/06/2014	<a href="#">George Fox , User</a>	George Fox University <span>?</span>

ExLibris **Alma**   Tasks Currently at: George Fox U

Resource Sharing Borrowing Requests

Limit results to:

- 
- [Returned by patron \(1\)](#)
- 
- [Oregon Health and Science \(1\)](#)
- 
- [Physical \(1\)](#)
- 
- [Physical \(1\)](#)
- 
- [In the Future \(1\)](#)

Search limited to:

Select All

1  [A short history of Australia /](#)  
**Book** By Scott, Ernest, (Oxford University Press c1936.)  
 External Identifier: TRINTEGRATION0008631  
 Partner: Oregon Health and Science  
 Requester: George Fox , User ?  
 Request Status: Returned by patron  
 Barcode: [RS-TRINTEGRATION0008631](#)  
 Due date: 09/07/2014  
 Pickup At: Main Library  
 Creation Date: 12/06/2014  
[Edit](#) | [Duplicate](#) | [Send](#) | [Send query to patron](#) | [Return](#) | [General Message](#)





# Borrower Return to Lender



ExLibris Alma

Tasks Currently at: George Fox University - GFU...

Scan In Items

Scan in Items Change Item Information

Scan in Items

Automatically Print Slip  Yes  No

External Identifier  Yes  No

Work Order Type

Scan item barcode \* RS-TRINTEGRATION0008631

Scan Request ID

Activated	Title	Destination	Request/Process Type	Req
	A short history of Australia /	System - Oregon Health and Science Request - TRINTEGRATION0008631	-	-

# Request Status



ExLibris Alma Tasks Currently at: George Fox University - GFU...

Resource Sharing Borrowing Requests

Limit results to:

- Status
  - [Returned item to partner \(1\)](#)
- Active Partner
  - [Oregon Health and Science \(1\)](#)
- Requested Format
  - [Physical \(1\)](#)
- Supplied Format
  - [Physical \(1\)](#)
- Due date
  - [In the Future \(1\)](#)
- Last Interest Date

[Add](#)

Search limited to: Update Date: **Today**

Select All

1  A short history of Australia /  
**Book** By Scott, Ernest, (Oxford University Press c1936.)  
External Identifier: [TRINTEGRATION0008631](#)  
Partner: Oregon Health and Science  
Requester: George Fox , User   
Request Status: Returned item to partner  
Barcode: [RS-TRINTEGRATION0008631](#)  
Due date: 09/07/2014  
Pickup At: Main Library  
Creation Date: 12/06/2014  
[Edit](#) | [Duplicate](#) | [Send](#) | [Send query to patron](#) | [General Message](#)



# Lender Receives Item Back



ExLibris

Alma

Tasks

Currently at: Oregon Health and Science -...

Scan In Items

Scan in Items

Change Item Information

Scan in Items

Automatically Print Slip No Yes

External Identifier No Yes

Scan item barcode \*

OK

Create Item

Scan Request ID

OK

Activated	Title	Destination	Request/Process Type	Requester
	A short history of Australia /	Main Library	Transit for reshelving	

Clear List

# Lender Audit



Date	Operator	Field name	Old value	New value
12/06/2014 06:34:07 EDT	OHS_USER	history.field_name.in_res_shr_request.item_return_date	-	2014-06-12
12/06/2014 06:34:07 EDT	OHS_USER	Status	Returned by partner	Request Completed
12/06/2014 06:34:07 EDT	OHS_USER	Partner Related Data	Returned message was received from GFU	Checkedin message was sent to GFU
12/06/2014 06:32:35 EDT	System	Status	Received by partner	Returned by partner
12/06/2014 06:32:35 EDT	System	Partner Related Data	Received message was received from GFU	Returned message was received from GFU
12/06/2014 06:26:09 EDT	System	Status	Shipped Physically	Received by partner
12/06/2014 06:26:09 EDT	System	Partner Related Data	Shipped message was sent to GFU	Received message was received from GFU
12/06/2014 06:21:43 EDT	OHS_USER	Send Date	-	2014-06-12
12/06/2014 06:21:43 EDT	OHS_USER	Due Date	-	2014-07-10
12/06/2014 06:21:43 EDT	OHS_USER	Status	Created lending request	Shipped Physically
12/06/2014 06:21:43 EDT	OHS_USER	Actual Shipped Format	-	Physical
12/06/2014 06:21:43 EDT	OHS_USER	Partner Related Data	-	Shipped message was sent to GFU
12/06/2014 06:21:43 EDT	OHS_USER	Shipping Cost	-	0.00 USD
12/06/2014 06:21:42 EDT	OHS_USER	Item Id	-	235965950000541
12/06/2014 06:21:42 EDT	OHS_USER	Item Barcode	-	95933
12/06/2014 06:21:42 EDT	OHS_USER	Assign To	-	OHS_USER

# Borrower Audit



ExLibris		Alma		Tasks	Currently at: George Fox University - GFU...
Audit					
General Information		Audit	Rota	Parameters	General Messages
		Notes	Attachments		
↕ Date	↕ Operator	↕ Field name	↕ Old value	↕ New value	
12/06/2014 06:34:07 EDT	System	Status	Returned item to partner	Request Completed	
12/06/2014 06:32:33 EDT	GFU_USER	Delivery Date	-	2014-06-12	
12/06/2014 06:32:33 EDT	GFU_USER	Status	Returned by patron	Returned item to partner	
12/06/2014 06:32:33 EDT	GFU_USER	Partner Related Data	-	Returned message was sent to OHS	
12/06/2014 06:30:21 EDT	main_operator	Return Date	-	2014-06-12	
12/06/2014 06:30:21 EDT	main_operator	Status	Loaned item to patron	Returned by patron	
12/06/2014 06:29:37 EDT	main_operator	Loan Date	-	2014-06-12	
12/06/2014 06:29:37 EDT	main_operator	Status	Physically received by library	Loaned item to patron	
12/06/2014 06:26:09 EDT	GFU_USER	Partner Related Data	-	Received message was sent to OHS	
12/06/2014 06:26:09 EDT	GFU_USER	Due Date	2014-07-10	2014-07-09	
12/06/2014 06:26:09 EDT	GFU_USER	Item Barcode	-	RS-TRINTEGRATION0008631	
12/06/2014 06:26:09 EDT	GFU_USER	Arrival Date	-	2014-06-12	
12/06/2014 06:26:09 EDT	GFU_USER	Status	Shipped Physically	Physically received by library	
12/06/2014 06:21:43 EDT	System	Due Date	-	2014-07-10	
12/06/2014 06:21:43 EDT	System	Status	Request sent to partner	Shipped Physically	
12/06/2014 06:21:43 EDT	System	Actual Shipped Format	-	Physical	
12/06/2014 06:21:43 EDT	System	Partner Related Data	ILLRequest message was sent to OHS	Shipped message was received from OHS	
12/06/2014 06:21:43 EDT	System	Shipping Cost	-	0.00 USD	
12/06/2014 06:15:29 EDT	System	Status	Ready to be sent	Request sent to partner	
12/06/2014 06:15:28 EDT	System	Status	Locate in process	Ready to be sent	
12/06/2014 06:15:28 EDT	System	Partner Related Data	-	ILLRequest message was sent to OHS	
12/06/2014 06:15:28 EDT	System	Active Partner	GFU	OHS	

# Alma Resource Sharing

Request may be fulfilled in a number of formats:



Returnable copy



Digital copy



Non Returnable copy

# Requesting Digitally

Resource Sharing Borrowing Request

General Information Parameters

**Resource Information**

Article\Chapter Title \* Developing Speech

Journal Title The Quarterly journal of speech.

Author Dr. Anthony Speaker

Volume

Author Initials

Issue 2001/April

ISSN

DOI

PMID

Publisher

Place of Publication

Additional Person Name

Source

Series Title Number

Note

Chapter

Pages

Start Page

End Page

Publication Date

**Request Attribute**

Requester \* George Fox , User - Staff

GFU\_USER

Owner George Fox University

Request Status Created borrowing request

Requested Format Digital

Allow Other Format

Preferred Send Method

Needed By

# Receive Lending Digital Request

ExLibris Alma

Tasks Currently at: Oregon Health and Sc

### Resource Sharing Lending Requests Task List

Limit results to:

- Status
  - [Created lending request \(1\)](#)
- Active Partner
  - [George Fox University \(1\)](#)
- Requested Format
  - [Digital \(1\)](#)
- Supplied Format
  - [Undefined \(1\)](#)
- Due date
  - [Undefined \(1\)](#)

Assigned to Me Unassigned

Add


Search limited to: Update Date: Today x

Select All

1  [The Quarterly journal of speech, Article](#) ([Falls Church, Va., etc., Speech Communication Association etc v. 14- Feb. 1928-)  
ISSN: 0033-5630  
Subject: Speech Periodicals. -- Elocution Periodicals. -- Oratory Periodicals.  
Availability: Physical version at MAIN: per-room (1 copy, 1 available)  
External Identifier: 1/TRINTEGRATION0008640  
Request Status: Created lending request  
Resource Locate Status: Resource Located  
[Edit](#) | [Manage Fulfillment Options](#) | [Duplicate](#) | [Reassign](#) | [Search](#) | [Detach from MMS](#) | [Reject](#)



# Manage Lending Digital Request

 **Manage Resource Options**

Title: - Author: -  
Alerts: -


**Electronic Services**



No records were found.

**Digital Services**

No records were found.

**Physical Services**


1 - 1 of 1 Records  **Tools**

 Library	 Location	Call Number	No. of Items	Available	
Main Library	Periodicals Room	-	1	1	<b>Actions</b>

No records were found.

[Cancel](#) **Remove Alerts** **Place Request**

# Manage Lending Digital Request

 **Create Request**

---

**Create Request**

Title The Quarterly journal of speech.  
Institution Training and Integration

Request/Process Type \* Ship digitally

Part to Digitize \* Article:Developing Speech

Target Destination \* Digitization Department For Institution

---

**Additional Request Attributes**

Partial Digitization true

---

**Add Request Attributes**

Material Type Refresh Values > JOURNAL Add Request Attribute

# Lender Digitizes

ExLibris Alma

Tasks Analytics

Currently at: Digitization Department For...

Scan In Items

Scan in Items Change Item Information

Scan in Items

Automatically Print Slip  No  Yes

Scan item barcode \* 70911

Scan Request ID

OK OK Create Item

Activated	Title	Destination	Request/Process Type	Request
<input checked="" type="checkbox"/>	<a href="#">The Quarterly journal of speech.</a>	Digitization	Ship digitally	-

Clear List

# Lender Digitizes

Items in Department

ExLibris Alma

Attachments

Request ID - Title The Q  
Digitization Type Partial Requester Orego

File name	Type	Size	Attached By	Attached On
Broker Resource Sh...	application/vnd.op...	2019.6kb	Implementer2, Ex Libris	15/06/2014 09:38:32

**Quick Add**

File name  
Broker Resource Sharing.pptx The maximum attachment size is 10 MB.

URL

Notes

**Add Attachment**

[Cancel](#) **Save** **Done**

ExLibris

# Request at Lender & Borrower Side

ExLibris Alma  Tasks Currently at: Oregon Health and Science -...

Resource Sharing Lending Requests Task List [Cancel](#) [Being Processed](#)

Limit results to:

Status

[Shipped Digitally \(1\)](#)

Active Partner

[George Fox University \(1\)](#)

Requested Format

[Digital \(1\)](#)

Search limited to: Update Date: **Today**

Select All

1  [The Quarterly journal of speech.](#)  
**Article** ([Falls Church, Va., etc., Speech Communication Association etc v. 14- Feb. 1928-)  
ISSN: 0033-5630

ExLibris Alma  Tasks Currently at: George Fox

Resource Sharing Borrowing Requests [returnable](#) | [General Message](#)

Limit results to:

Status

[Shipped Digitally \(1\)](#)

Active Partner

[Oregon Health and Science \(1\)](#)


Creation Date

[Today \(1\)](#)

Update Date

[Today \(1\)](#)

Select All

1  [Developing Speech](#)  
**Article** By Dr. Anthony Speaker  
External Identifier: TRINTEGRATION0008640  
Partner: Oregon Health and Science  
Requester: George Fox, User   
Request Status: Shipped Digitally   
Pickup At: Main Library  
Creation Date: 15/06/2014  
[Edit](#) | [Duplicate](#) | [Send](#) | [Send query to patron](#) | [Receive](#) | [General Message](#)



# Borrower Receives Digital Copy

ExLibris Alma

Tasks Currently

Received Items

Received Items

Received Format  Physical  Digital  Physical non-returnable

External Identifier  OK

Complete the request

No records were found.

ExLibris Alma

Tasks Currently at: George Fox University - GFU...

Received Items

Received Items

Received Format  Physical  Digital  Physical non-returnable

External Identifier  OK

Complete the request

Activated	Title	Destination	Request/Process Type	Requester
<input checked="" type="checkbox"/>	<a href="#">Developing Speech</a>	mosheshchtr@gmail.com	Borrowing Request	George Fox , User

Clear List

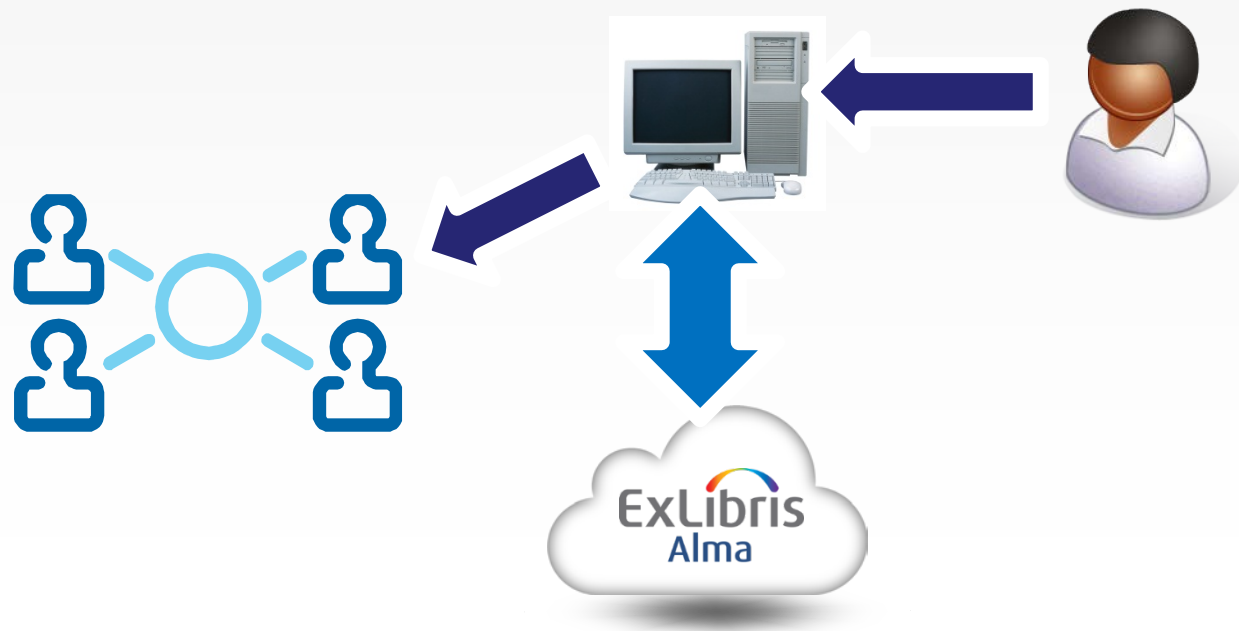


## Broker Workflow



# Broker Based Integrations

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



# Broker Based Integrations

Broker based integrations are based on three points of integration:

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

# Broker Based Integrations

Alma is currently used in a broker model with:

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



# Integration Points

---

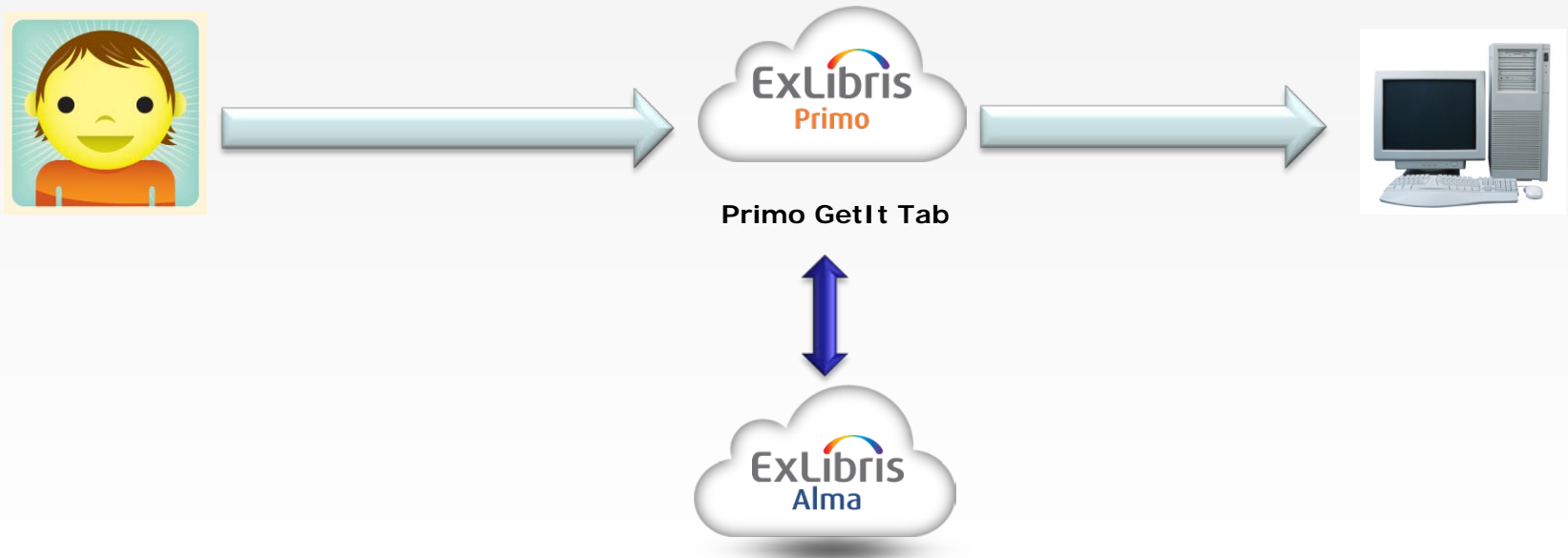
- ✓ Creating the request
- ✓ Being a searchable target
- ✓ Integrating the Fulfillment process

# Alma & Broker – Creating the Request

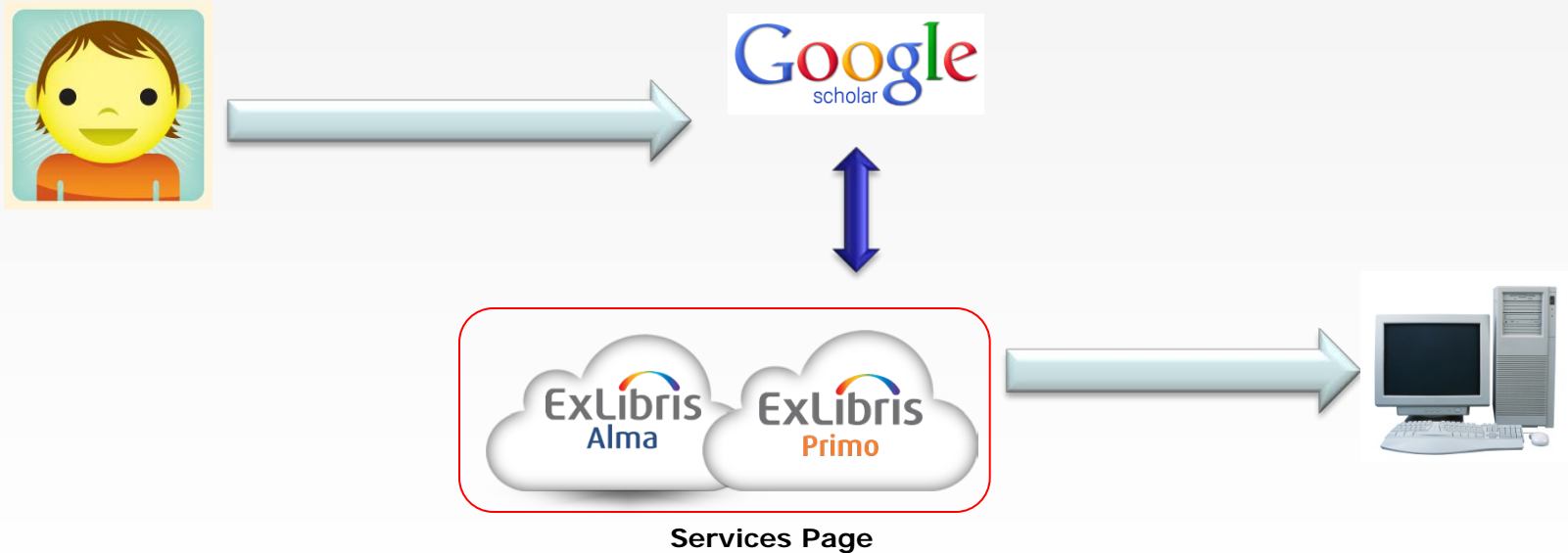
- Patrons may use the broker's discovery
- If using a discovery interface other than the broker as the starting point for searching (e.g. Primo or Google), it is possible to direct users to the Broker discovery.
- To take advantage of this option it is necessary for the discovery interface to generate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



# Alma & the "Broker" – Creating the Request



# Alma & the "Broker" – Creating the Request



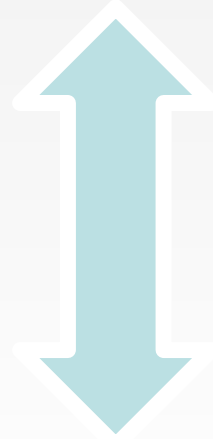
# Integration Points

---

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



# Alma & the "Broker" – Being Searchable



**Borrower :**  
**Self and partner ownership**

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

**Lender:**  
**Availability and slip printing**

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



# Alma & the "Broker" – Being Searchable

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

# Integration Points

---

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

# Alma & the "Broker" – Fulfillment Actions

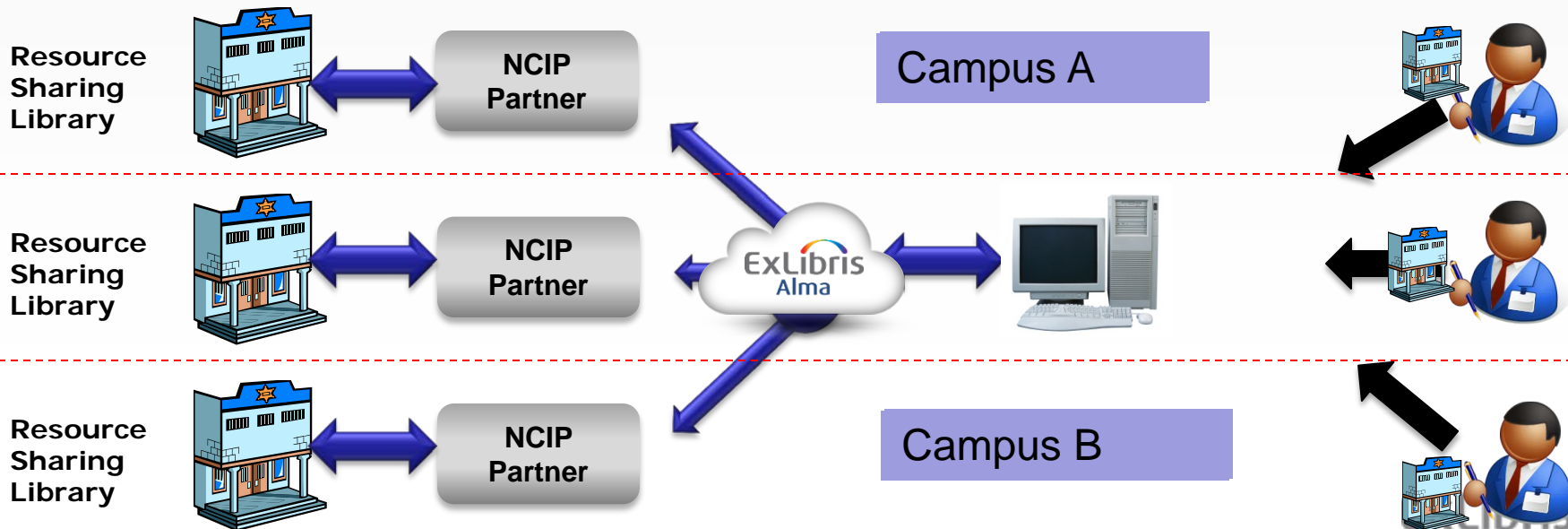
```

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

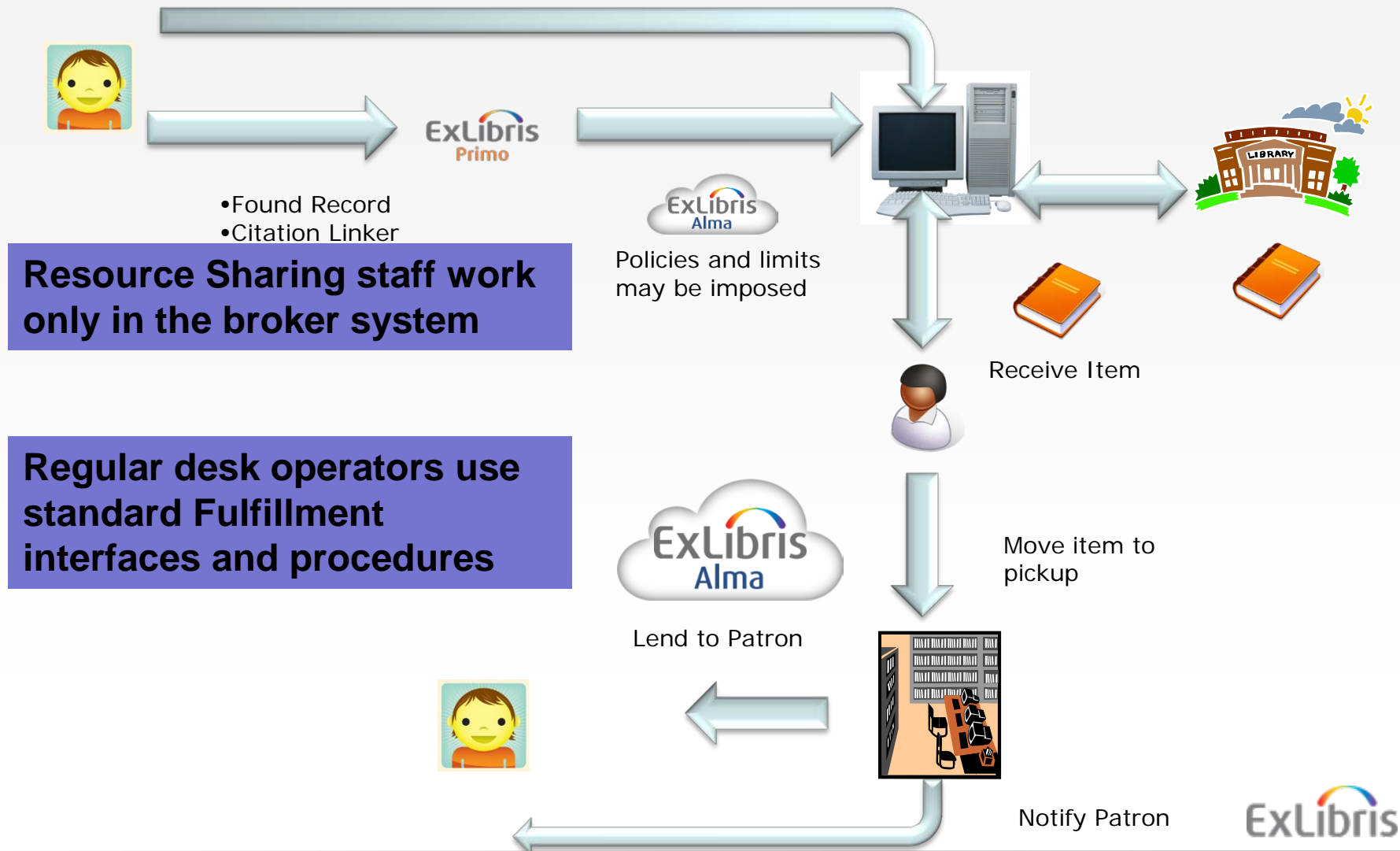
```

Institution

NCIP Partner



# Fulfillment Actions – Borrowing Side



# Fulfillment Actions – Borrowing Side



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



**Resource Sharing staff work only in the broker system**

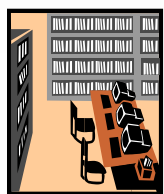
**Regular desk operators use standard Fulfillment interfaces and procedures**



Send item back

Receive from Patron

Item to Resource Sharing Department

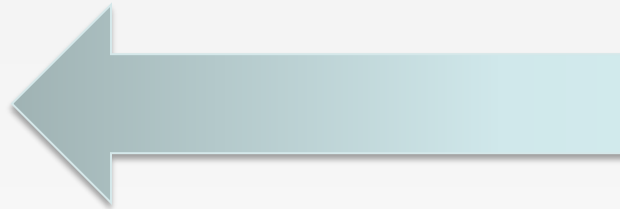


# Alma & the "Broker" – Fulfillment Actions

Borrowing

Borrower

LookUpUser



LookupUser is used to:

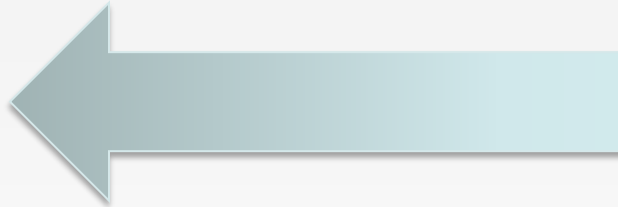
- ✓ **Authorize** the borrowing patron at the point when they try and place a request.
- ✓ The patron's **contact information** (email address, contact phone and mailing address) **is retrieved** at this point along with the internal ILS patron id

# Alma & the "Broker" – Fulfillment Actions

Borrowing

Borrower

AcceptItem



AcceptItem is used to:

- ✓ **Notify** Alma that an item has arrived
- ✓ **Temporary item is created** in Alma, with a request that is linked to the Relais request ID

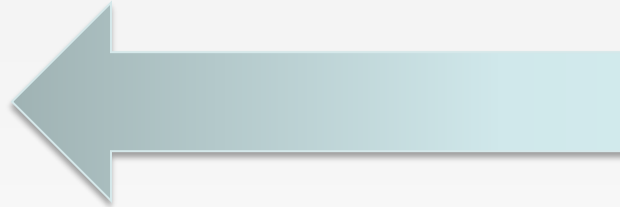


# Alma & the "Broker" – Fulfillment Actions

Borrowing

Borrower

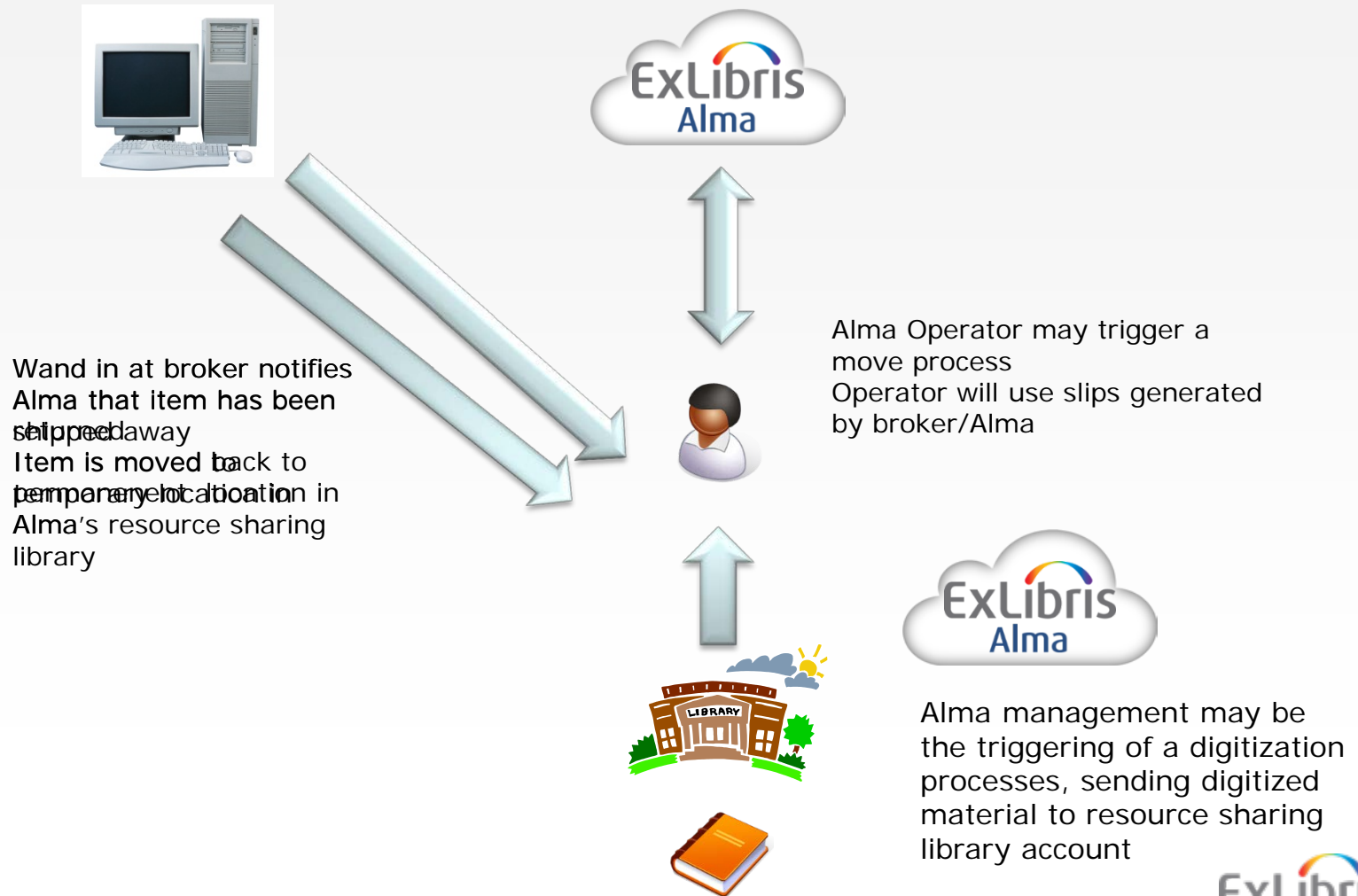
CheckInItem



CheckInItem is used to:

- ✓ **Notify** Alma that temporary item has been shipped back to lender
- ✓ **Temporary item is deleted** in Alma, and the loan is cancelled (if has not been cancelled before)

# Fulfillment Actions – Lending Side

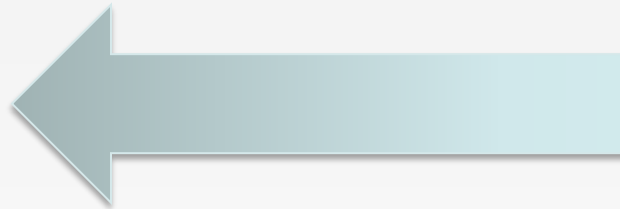


# Alma & the "Broker" – Fulfillment Actions



Lender

CheckOutItem



CheckOutItem is used to:

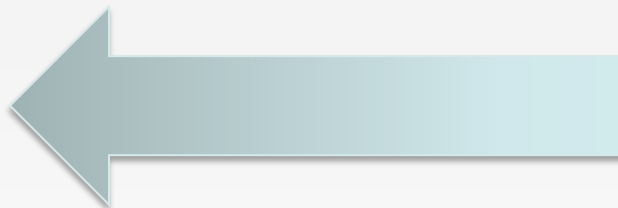
- ✓ **Notify** Alma that item has been shipped to borrower
- ✓ Item is identified as in a resource sharing process

# Alma & the "Broker" – Fulfillment Actions



Lender

CheckInItem



CheckInItem is used to:

- ✓ **Notify** Alma that item has been returned by borrower
- ✓ Item is processed back for shelving at original location

**THANK YOU!**

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**IGeLU & Ex Libris**  
Conference Systems Seminar

Oxford, September 15-19 2014

