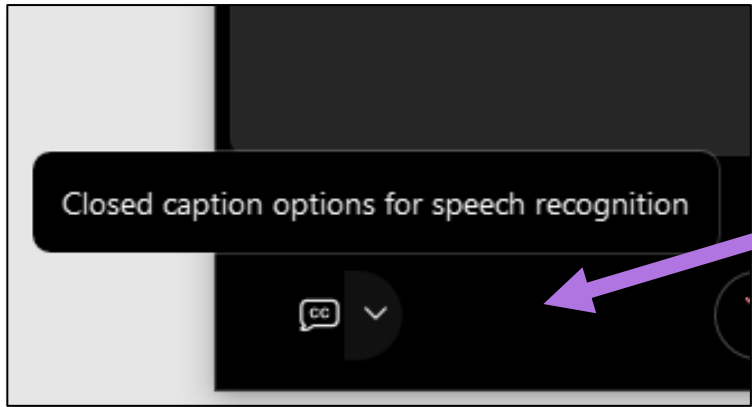
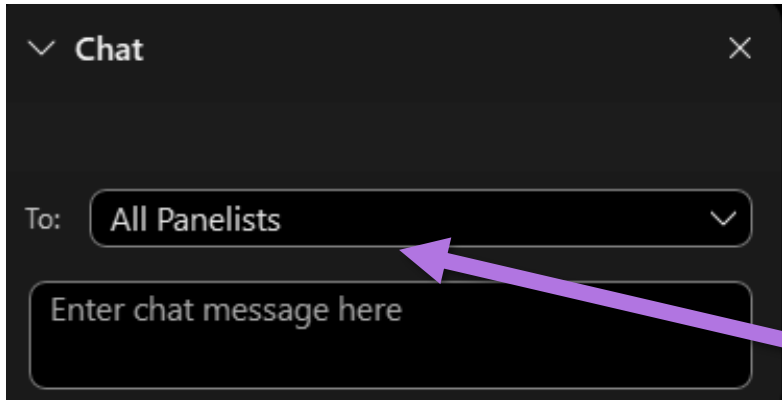


Resource Sharing Fundamentals

A few points about WebEx



- Technical issues? Exit and rejoin the WebEx session
- This session is being recorded
- Submit questions via WebEx Chat: Select **All Panelists** in the **To:** dropdown menu
- Turn captions on and off in the lower-left corner of the WebEx screen

Training-Series Session Topics

Session	Topic	Date
1	Resource Sharing Fundamentals	Feb. 11/12
2	Peer-to-Peer Resource Sharing	Feb. 18/19
3	Automated Fulfillment Networks	Feb. 25/26
4	Broker-based (NCIP) Resource Sharing	Mar. 4/5

Agenda

- **Overview of Methodologies**
- Resource Sharing Library
- Other Configurations

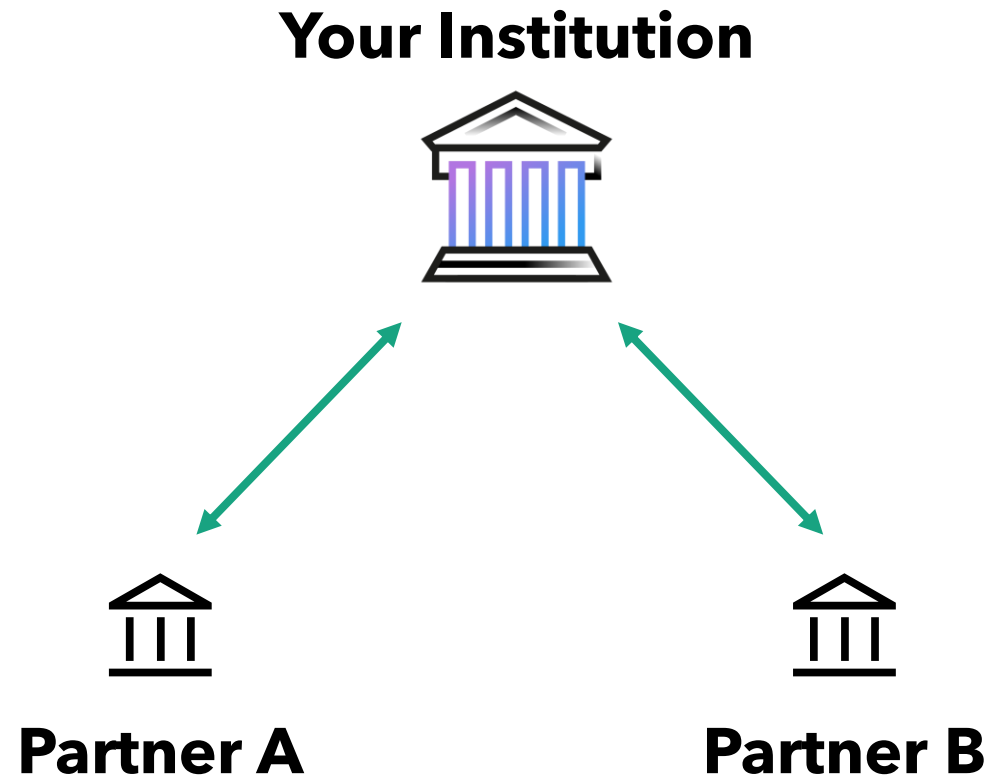
What is Resource Sharing?

- Request by a patron at one institution that is fulfilled by a different institution
- Also called document delivery, inter-library loan (ILL), etc.
- This series focuses on borrowing/lending of **physical** items
- Several different methodologies, each of which has varied configuration and workflow options
- In Alma: Peer-to-Peer, Automated Fulfillment Networks, and Broker-Based

Peer-to-Peer

- Patron places a request at their home institution (e.g., via Primo)
- Alma builds a **rota** of possible partners and uses **locate profiles** to identify available lenders
- Lender sends the item to the borrowing institution
- Borrower and lender communicate directly to complete the request
- Communication typically uses **ISO** protocol

Peer-to-Peer: Diagram



Peer-to-Peer: Pros and Cons

Pros

- Highly customizable
- Extensive control over partner selection
- All work is performed in Alma
- No need for a separate product

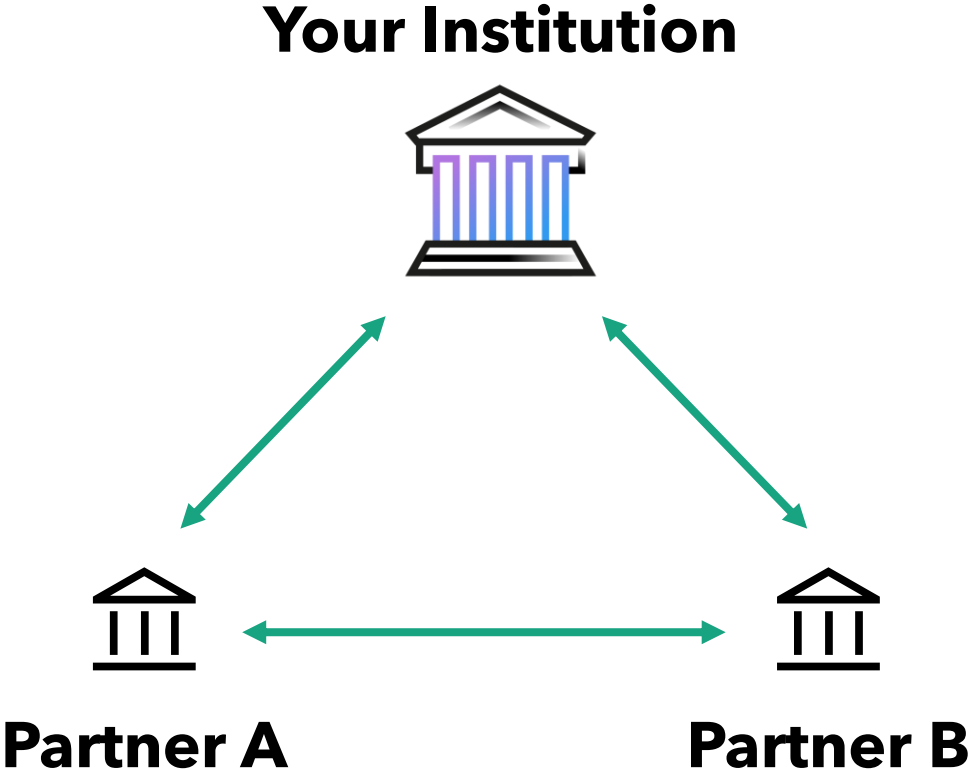
Cons

- Significant configuration required
- Need to set up each new partner
- Most straightforward when partners are using Alma

Automated Fulfillment Network

- Patron places a request at their home institution (e.g., via Primo)
- Alma builds a **rota** of possible partners and uses **locate profiles** to identify available lenders
- Fulfillment Network **hold request** is created at lending institution
- Pick from shelf workflow is handled like a regular hold request
- Patron can request pick up from any network institution
- Typically used in a Network Zone consortial setup

Automated Fulfillment Network: Diagram



Automated Fulfillment Network: Pros and Cons

Pros

- Works well for Network environments with reciprocal borrowing
- Can easily be used alongside “regular” peer-to-peer Resource Sharing
- Workflow is streamlined with day-to-day circulation operations
- Shared users and barcodes
- Pickup anywhere

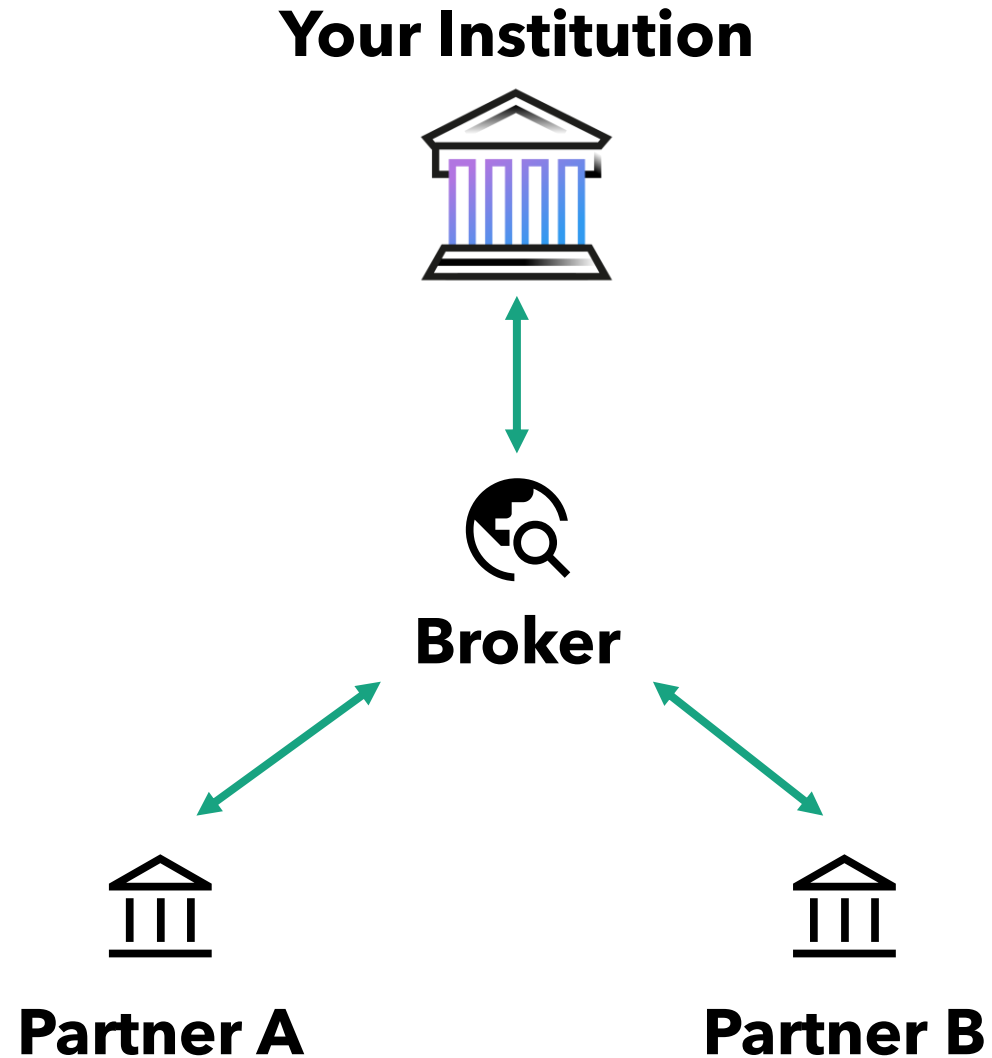
Cons

- Primarily used by consortia
- Integration between Resource Sharing elements and Fulfillment Network hold/loan elements can be confusing
- May require additional Resource Sharing partnerships if all requests cannot be fulfilled within the Network

Broker-Based

- Patron places a request in the broker system (e.g., ILLiad)
- Broker identifies a lending institution
- Circulation is performed in the broker system
- Alma communicates with the broker system for updates
- Communication typically uses the **NCIP** protocol

Broker-Based: Diagram



Broker-Based: Pros and Cons

Pros

- Partner selection is handled by the broker
- Less need for staff intervention or configuration
- Larger array of potential partners, not limited to Alma
- Higher fill rates

Cons

- Minimal customization options
- Requires working in the broker system
- Limited communication between borrower and lender

Agenda

- Overview of Methodologies
- **Resource Sharing Library**
- Other Configurations

Configuring the Resource Sharing Library

- Checkbox: Is resource sharing library
- Enables configuration specific for Resource Sharing workflows
- Can be enabled for any institution library

Organization Unit Details

Summary | Contact Information | Calendar Management | IP Definitions

General Details

Organization unit name *	<input type="text" value="Resource Sharing Library"/>
ISIL Code	<input type="text"/>
Base URL	-
Description	<input type="text" value="Temporarily manages inventory that is sent to or received from resource sharing partners"/>
Premium sandboxes:	<input type="text" value="0: No Premium SB"/>
Default location for acquisition	<input type="text"/>
Campus	<input type="text"/>
Proxy	<input type="text"/>
Time to reshelve (hours)	<input type="text"/>
Delay for hold notification (minutes)	<input type="text"/>

Allow other libraries to handle personal delivery

Resource Sharing Information

Is resource sharing library	<input checked="" type="checkbox"/>
-----------------------------	-------------------------------------

Resource Sharing Library: Key Settings

- **Borrowing Setup:** Default location, Default pickup location
- **Lending Setup:** Default location
- **Calendar Management:** Standard opening hours



How do I pick my Resource Sharing Library?

- How is the work performed at your institution?
 - In a separate department: try a standalone RS Library
 - At the circulation desk: your Main Library might be your RS Library
 - Multiple distinct departments: you can have more than one RS Library
- There is no one “right” answer

Agenda

- Overview of Methodologies
- Resource Sharing Library
- **Other Configurations**

Library Relationships

Configuring: Resource Sharing Library > Fulfillment > Library Management > Relationships

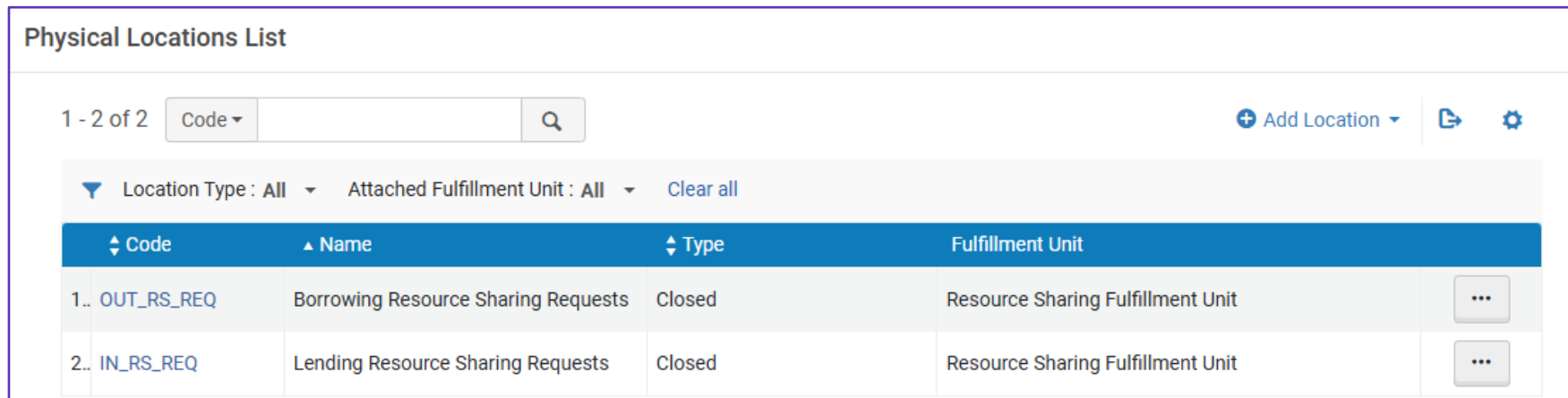
- Ensure the Resource Sharing Library can **Deliver To** and **Supply From** other libraries
- Ensure other libraries can **Deliver To** and **Circulate For** the Resource Sharing Library

<input type="checkbox"/>	Name	Description	Deliver To	Circulate For	Acquire For	Supply From	Note
1 <input type="checkbox"/>	All	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-

Resource Sharing Locations

Configuring: Resource Sharing Library > Fulfillment > Locations > Library Locations

- Create locations for items in Resource Sharing processes
- Typically one location for borrowing and one for lending
- Locations need to be associated with a Circulation Desk and the Resource Sharing Fulfillment Unit



The screenshot displays the 'Physical Locations List' interface. At the top, it shows '1 - 2 of 2' items, a search bar with a 'Code' dropdown and a search icon, and buttons for '+ Add Location', a share icon, and a settings icon. Below this, there are filters for 'Location Type: All' and 'Attached Fulfillment Unit: All', along with a 'Clear all' link. The main table has four columns: 'Code', 'Name', 'Type', and 'Fulfillment Unit'. Two rows are visible: '1.. OUT_RS_REQ' with name 'Borrowing Resource Sharing Requests' and '2.. IN_RS_REQ' with name 'Lending Resource Sharing Requests'. Both have a 'Type' of 'Closed' and are associated with the 'Resource Sharing Fulfillment Unit'. Each row has a three-dot menu icon to its right.

Code	Name	Type	Fulfillment Unit
1.. OUT_RS_REQ	Borrowing Resource Sharing Requests	Closed	Resource Sharing Fulfillment Unit
2.. IN_RS_REQ	Lending Resource Sharing Requests	Closed	Resource Sharing Fulfillment Unit

Resource Sharing Fulfillment Unit and Terms of Use

Configuring: Resource Sharing Library > Fulfillment > Physical Fulfillment > Fulfillment Units > Resource Sharing Fulfillment Unit

- Create Fulfillment Unit Rules to apply Terms of Use for Resource Sharing items
- **Borrowing Rules:** enable patrons to submit Resource Sharing requests in Alma/Primo
- **Lending Rules:** define terms for items you loan to other institutions
- **Loan Rules:** enable borrowed items to be loaned to patrons

Optional: Temporary Item Creation Rules

Configuring: Resource Sharing Library > Fulfillment > Library Management > Temporary Item Creation Rules

- Define rules indicating that a borrowed item should be placed in a particular location
- For example, items received from partner **A** should be placed in location **X**
- This allows you to define specific Terms of Use for those items
- If rules are not defined, items will be created in the default location



Additional Resources

Documentation and Training

- Resource Sharing Workflow
- Configuring Parameters of a Resource Sharing Library
- Configuring Physical Fulfillment
- Temporary Item Creation Rules

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Thank You!

Please fill out the survey that will appear
when you close the WebEx meeting

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