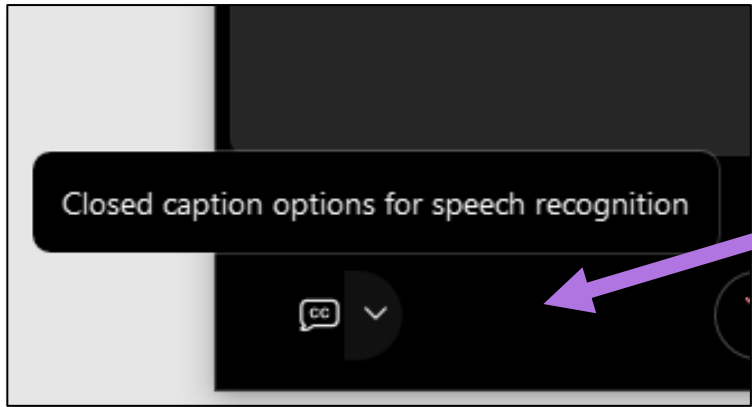
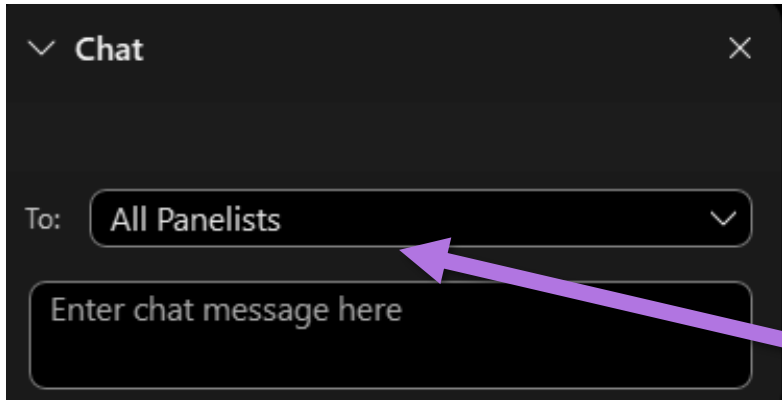


Peer-to-Peer Resource Sharing

February 2025

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

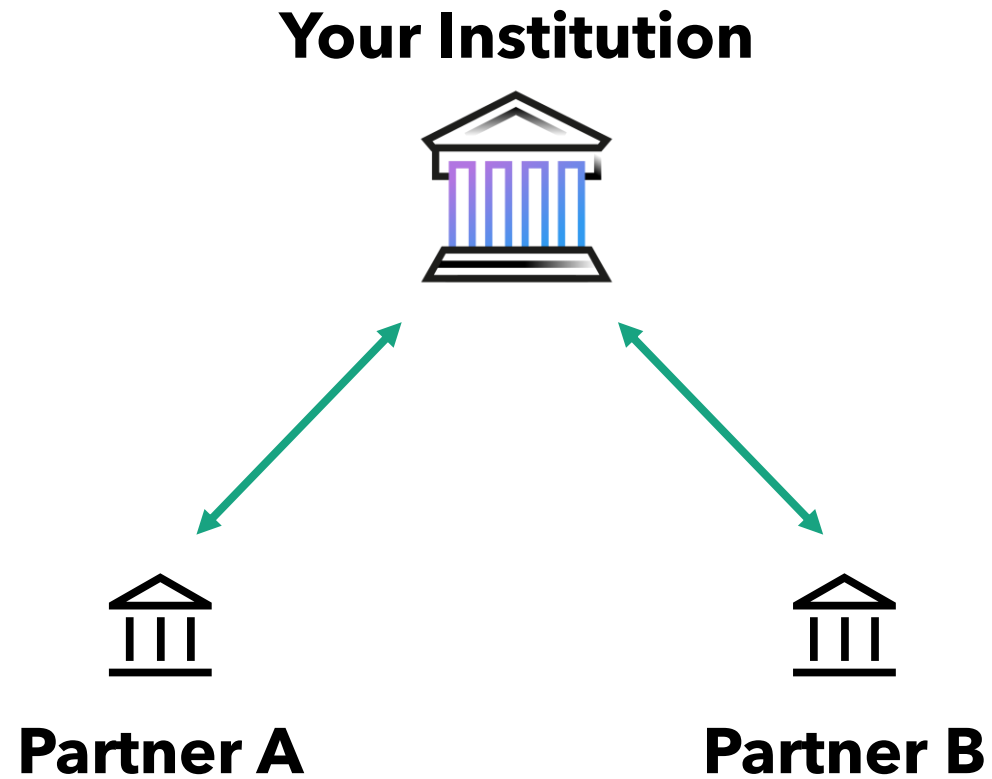
Training-Series Session Topics

| 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 |

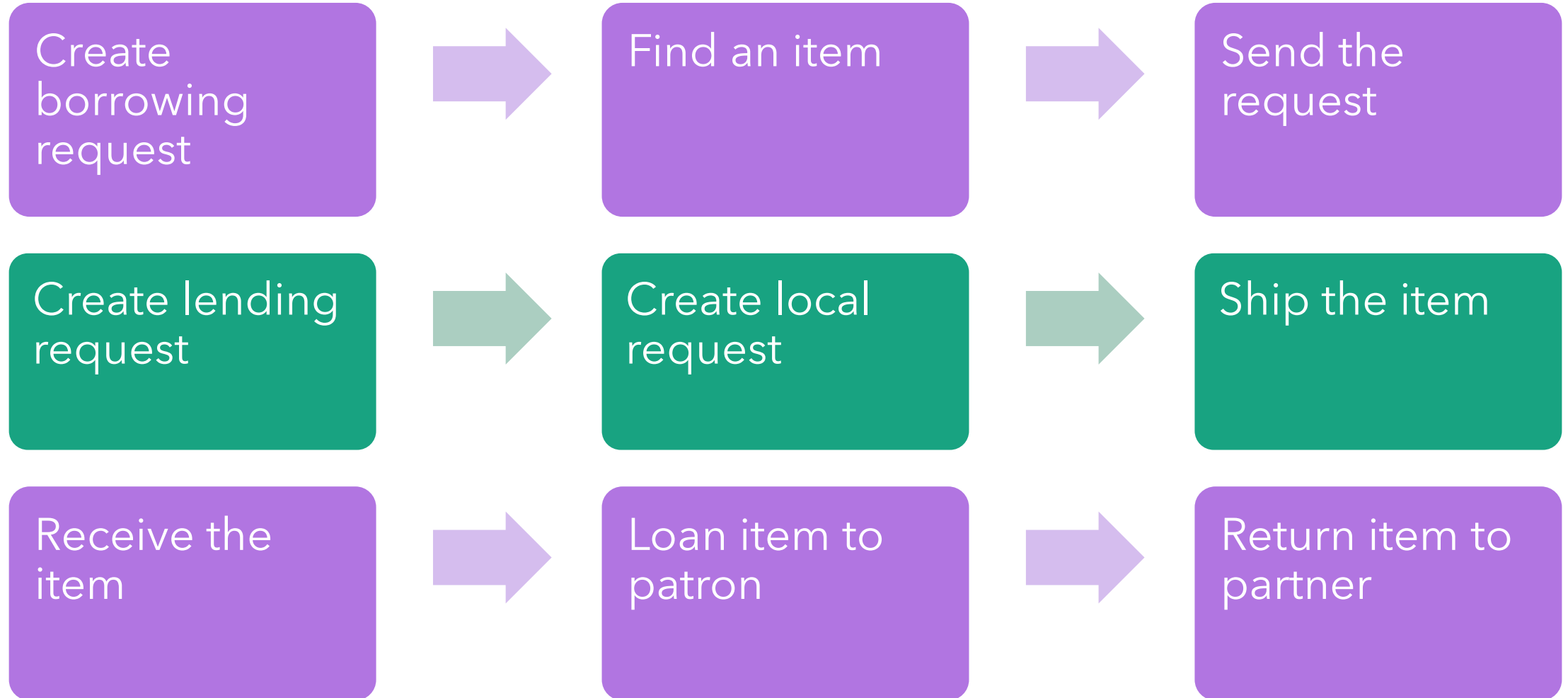
Agenda

- **Introduction**
- Borrowing
- Lending
- Circulation
- Resource Sharing Directory

Peer-to-Peer: Diagram



Peer-to-Peer Workflow



Roles

Configuration

- Fulfillment Administrator
- Resource Sharing Partners Manager

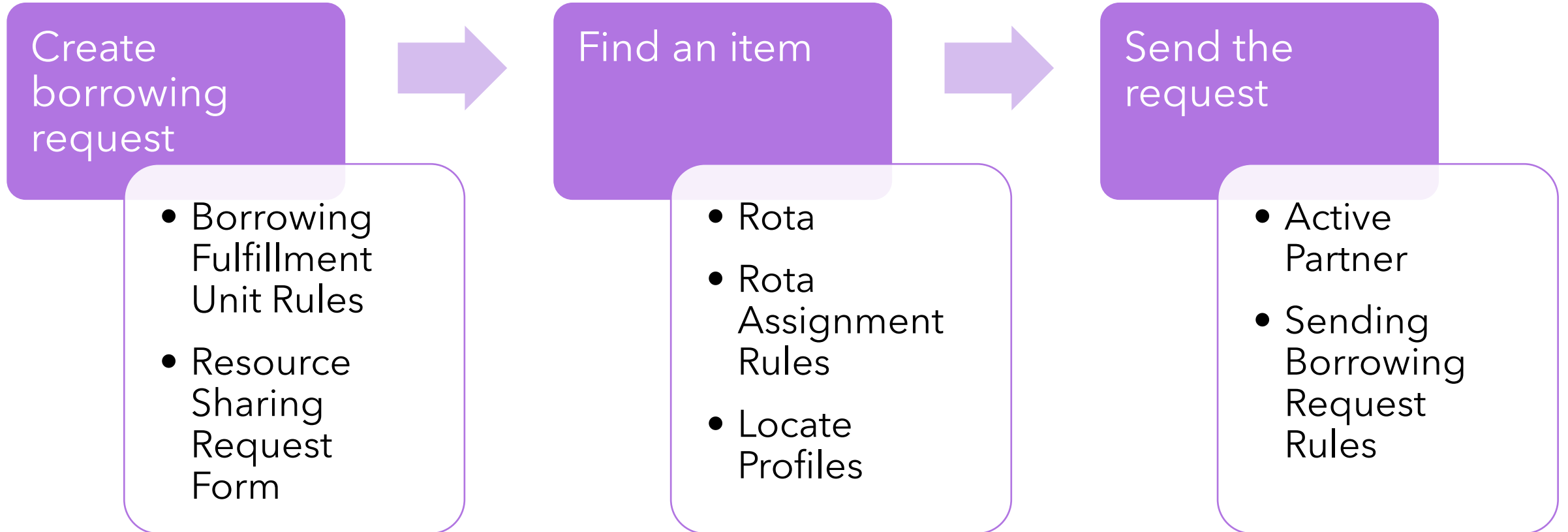
Operations

- Fulfillment Services Manager/Operator (**must** be scoped to Resource Sharing Library)
- Circulation Desk roles

Agenda

- Introduction
- **Borrowing**
- Lending
- Circulation
- Resource Sharing Directory

Borrowing Workflow



Partner Configuration: General Information

General Information | Contact Information | Parameters | Notes | Attachments

Code * TRAINING_1_INST

Name * Alma Institution (For Demo)

Profile Type * ISO ← Communication used for Peer-to-Peer

Status Active

System Type * Alma ← System used by the partner institution

Average Supply Time 0

Delivery Delay (days) 0

Currency

Alternate Symbol

Locate Profile Alma Institution - TRAINING_1_INST on NA02

Institution Code TRAINING_1_INST

Holdings Code

How to search the partner's catalog

Supports Borrowing ← Enable borrowing from and lending to the partner

Borrowing Workflow Borrowing All ← Customize the borrowing/lending workflow

Supports Lending

Lending Workflow Lending All

New Request Alert

Fulfillment > Resource Sharing > Partners

Partner Configuration: Parameters

General Information | Contact Information | **Parameters** | Notes | Attachments

ALTERNATIVE DELIVERY ADDRESS

Supports ADD Address

GENERAL INFORMATION

Server * Port *

Symbol *

Request Expiry No expiry Expire by set date Expiry time

Send requester information

Shared Barcodes

Ignore Lender Shipping Cost

Resending Overdue Days Interval

Server for the partner institution (e.g., Alma domain)

Port used for communication: if partner uses Alma, this is port 9001

Unique ISO symbol used to identify the partner institution

Fulfillment > Resource Sharing > Partners

Rota Templates

- Rota = List of Resource Sharing partners
- Each rota can include one or many partners
- Partners must be added to one and only one template
- Templates can be ordered or non-ordered

Fulfillment > Resource Sharing > Rota Templates

Rota Assignment Rules

- Used to assign rotas to borrowing requests
- Configure input parameters
- Define a rota as output
- Rules are followed in order and rotas are added sequentially if conditions are met

*Configuration > Fulfillment > Resource Sharing >
Rota Assignment Rules*

Locate Profiles

- Determines how Alma searches a resource sharing partner's catalog
- Uses Z39.50, so partner must have a Z39.50 Integration Profile configured
- Searches for a matching item using metadata in the borrowing request
 - Default: LCCN, System Control Number, ISBN/ISSN, Title
- If searching an Alma partner, can also check item availability and requestability

Configuration > Fulfillment > Resource Sharing > Locate Profiles

Sending Borrowing Request Rules

- Indicate when a borrowing request should be sent to the partner automatically
- Configure input parameters
- Define as output whether the request should be sent

*Configuration > Fulfillment > Resource Sharing >
Sending Borrowing Request Rules*

Resource Sharing Library Configuration: Borrowing

Resource Sharing Information

Is resource sharing library

Itemless

Symbol

BORROWING SETUP

Cancel request on locate failure

Automatically activate locate profile

Temporarily inactive for borrowing

Default location

Default pickup location

Extend due date when renew requested

Define the ISO symbol for your library. This value must be wholly unique.

Cancel the borrowing request if the locate process does not find a partner.

Runs the locate process automatically.

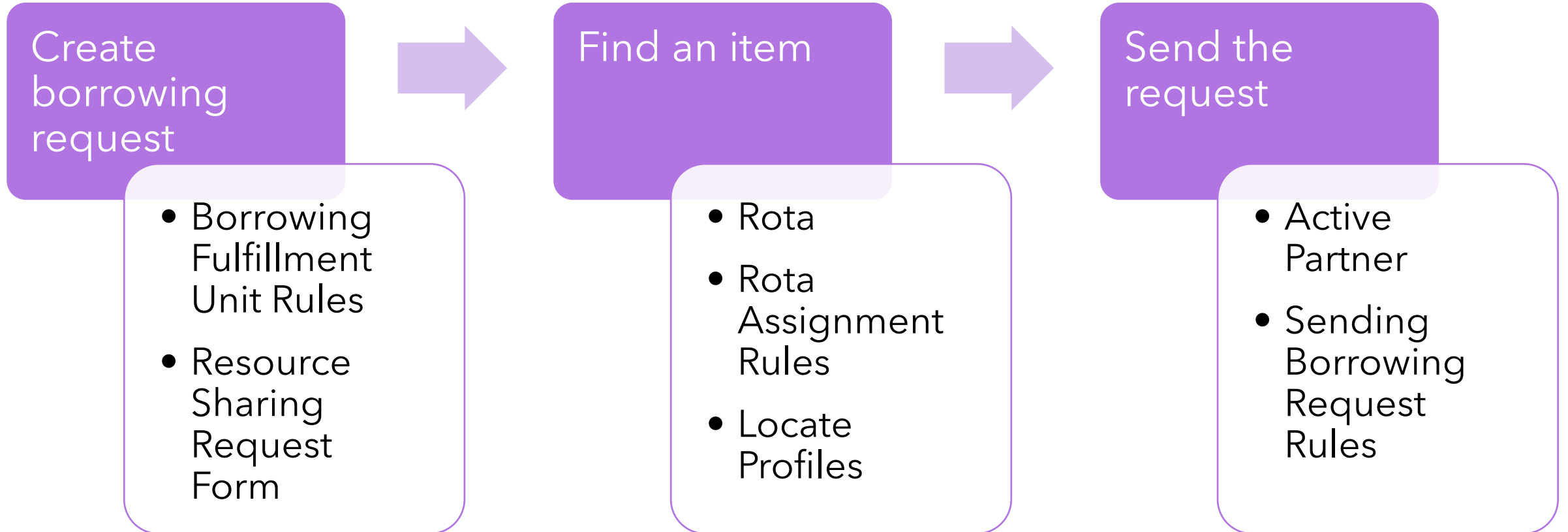
Prevent patrons from borrowing without needing to change any other settings.

Workflow Profiles

- Determines the actions that can be performed on borrowing and lending requests for the attached partner
- Separate profiles are defined for borrowing and lending
- Profiles can be attached to multiple partners

Configuration > Fulfillment > Resource Sharing > Workflow Profiles

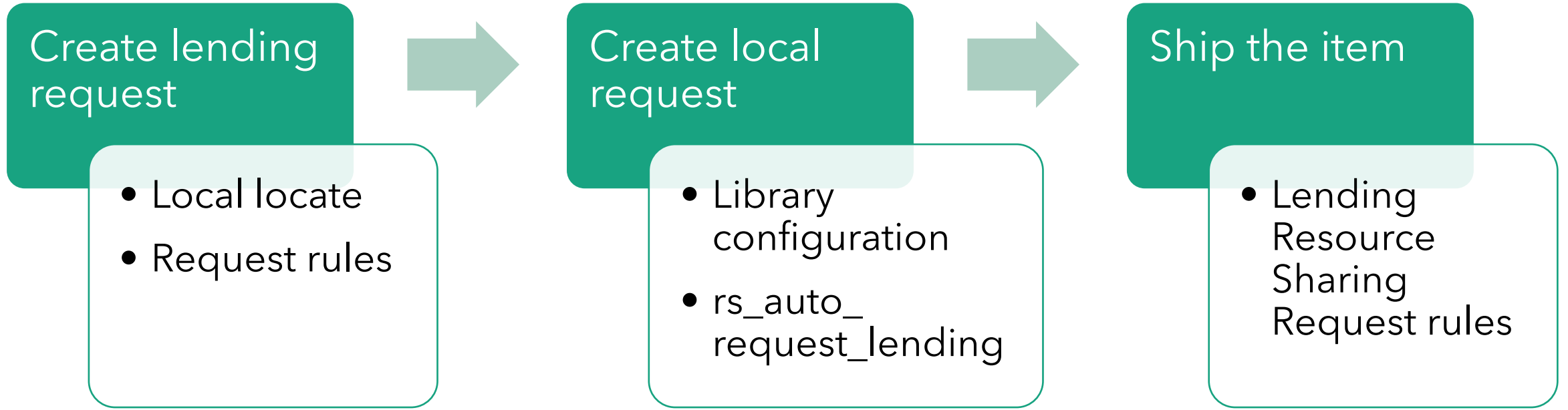
Borrowing Workflow



Agenda

- Introduction
- Borrowing
- **Lending**
- Circulation
- Resource Sharing Directory

Lending Workflow



Resource Sharing Library Configuration: Lending

LENDING SETUP

Automatically locate resource ← Allows the local locate process to start automatically.

Reject request when locate fails

Reject request when no available items

Reject request when no requestable items

Reject request when only electronic available Electronic Rejection Rules

Ignore electronic resources

Ignore electronic resources for physical-only requests

Prefer Uresolver locate results

Automatic creation

Temporarily inactive for lending ← Closes library as a lending library without needing to change any other settings.

Default location

Locate by fields ← Customize fields that are used for the self-locate.

Determines automatic rejection behavior if the locate fails.

Create Local Move Request

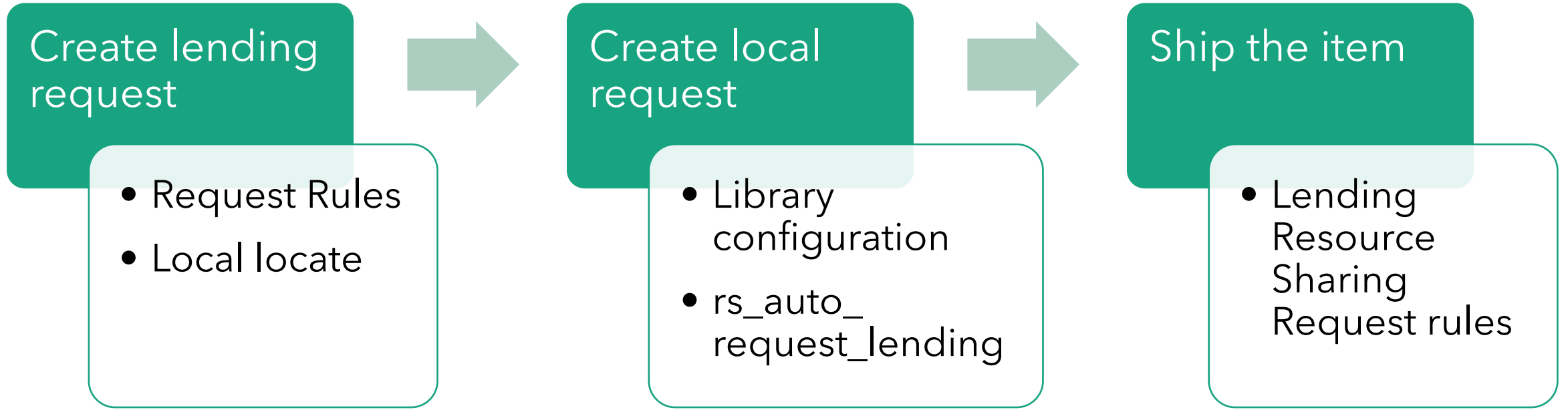
- Set **rs_auto_request_lending** to **true** to create local requests automatically
- When the local locate identifies an item, a move request is placed to fulfill the lending request
- The local request will appear in the Pick from Shelf list

Configuration > Fulfillment > General > Other Settings

Request Terms of Use

- Necessary to configure Request Terms of Use for items you are willing to lend to other institutions
- Policy: Is Requestable for Physical Resource Sharing = True
- Fulfillment Unit Rule cannot include input parameters related to patrons (such as User Group)

Lending Workflow



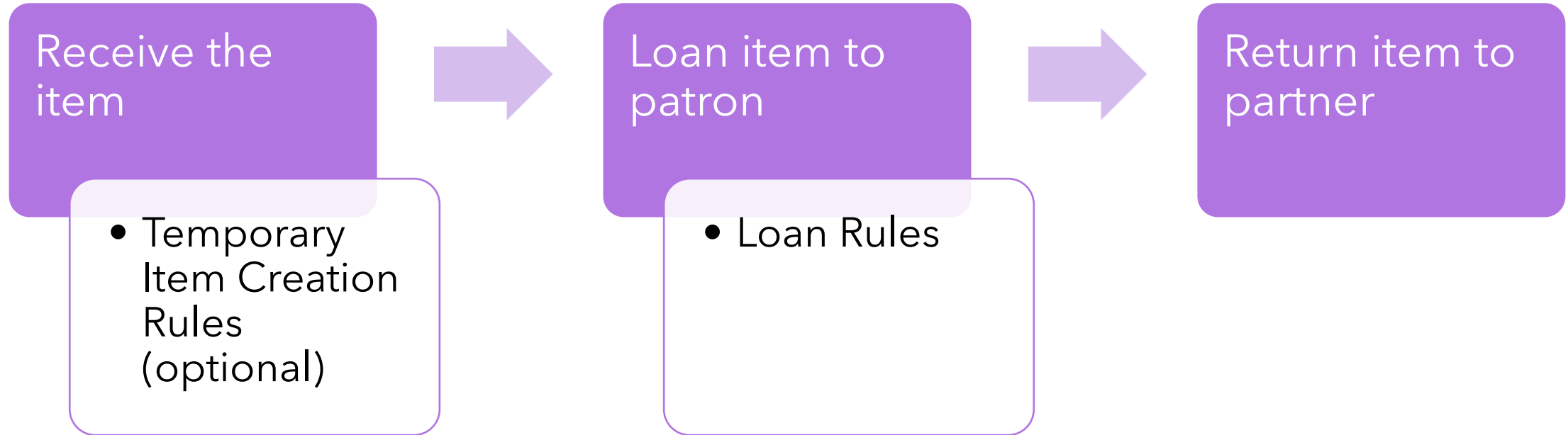
Shipping Items

- Can be done from the Lending Request Task List, Shipping Items interface, or Scan In Items (less recommended)
- Shipped item is moved to a temporary location
- Item is given Process Type = Resource Sharing Request

Agenda

- Introduction
- Borrowing
- Lending
- **Circulation**
- Resource Sharing Directory

Circulation Workflow



Receiving Items

- Must be performed at the Resource Sharing Library
- Can be done from the Borrowing Request Task List, Receiving Items interface, or Scan In Items (less recommended)
- Received item is given a temporary barcode and has a suppressed bibliographic record
- Item can then be loaned to the patron

Completing the Request

- Return item to the Lender via the Borrowing Request Task List or Scan In Items
- Temporary bibliographic record and item are removed from Alma
- Item is shipped back to the Lender
- Lender checks in the item via the Lending Request Task List or Scan In Items, completing the request

Agenda

- Introduction
- Borrowing
- Lending
- Circulation
- **Resource Sharing Directory**

Resource Sharing Directory

- Allows institutions to find each other for quick Resource Sharing setup
- Adding a partner from the Resource Sharing Directory:
 - Creates a partner record in Alma
 - Adds the connection information automatically
 - Creates a Locate Profile

Resource Sharing Partner List

Institution **Community**

1 - 5 of 5 All

[+ Add Partner](#) [Share](#) [Settings](#)



Additional Resources

Documentation and Training

- [Peer-to-Peer Resource Sharing](#)
- [Basic Resource Sharing Configurations](#)
- [Advanced Resource Sharing Configurations](#)
- [Configuring Parameters of a Resource Sharing Library](#)
- [Configuring Other Settings \(Fulfillment\)](#)
- [Contributing to the Resource Sharing Directory](#)

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Thank You!

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