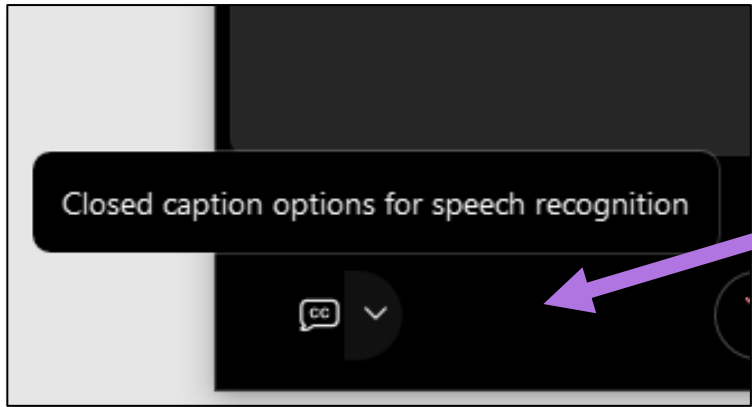
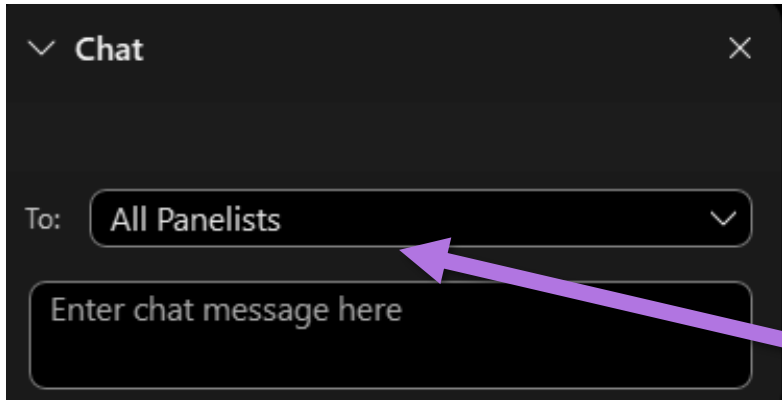


Broker-Based (NCIP) Resource Sharing

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**
- NCIP Messages
- Request Creation
- Partner Configuration
- Demo

Broker Systems

- Patron requests are created in the broker system
- Broker system manages locating partners and processing requests for resources
- Examples: ILLiad, Tipasa
- Work can be completed entirely within external system
- Actions in the broker system can be communicated with Alma to update request and item processes automatically
 - This is our focus in today's session

What is NCIP?

- NISO Circulation Interchange Protocol
- Method of communication between library systems
- When an action is performed in the broker system, an NCIP message is sent to Alma, such as:
 - Shipping an item to a partner (Lending)
 - Receiving an item requested by a patron (Borrowing)
- NCIP messages should include relevant fields and information for Alma to process the relevant action

Integrating the Broker System with Alma

- Any broker system that supports NCIP communication can be integrated with Alma
- Different systems may support different workflow options
- Key elements for communication from the broker system:
 - NCIP URL: Alma domain suffixed with /view/NCIPServlet
 - AgencyId: Alma institution code
 - ApplicationProfileType: Code of the partner record in Alma

Agenda

- Introduction
- **NCIP Messages**
- Request Creation
- Partner Configuration
- Demo

Request Creation: Lending

Broker



CheckOutItem

Alma



Item is processed
and ready to be
shipped

Lending request
is created and
item is marked as
shipped

Request Creation: Borrowing

Broker



AcceptItem

Alma



Item is received
for borrowing

Borrowing
request and
temporary item
are created

Request Completion: Borrowing

Broker



CheckInItem

Alma



Item is returned
to lender

Temporary item is
deleted and
request is marked
complete

Request Completion: Lending

Broker



CheckInItem

Alma



Item is received
back at lender

Item is put back in
place and request
is marked
complete

Other Request Messages

Some other NCIP messages may be supported for steps in the broker-based workflow:

- RequestItem
 - Used to create a lending or borrowing request in Alma
 - Note: most broker systems will not create borrowing requests with this message
- RenewItem
 - Used to communicate renewal information

A full list of NCIP messages is available on the [Developer Network](#).

Agenda

- Introduction
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- **Request Creation**
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- Demo

Broker Requests: General Electronic Services

- Create a link in Primo that directs patrons to the broker system
- Link includes metadata related to the requested resource
- Different services can be created for books, articles, etc.

▲ Service Name	↕ Service Code	↕ Public Name	Service Description	Is this a Document Delivery/ILL service?	Display Location	
ILLiad for Articles/Journals	ILLIAD-A	Request from Interlibrary Loan	ILLiad link for article and journals	true	Getit & How To Getit	...
ILLiad for Books/Book Items	ILLIAD-B	Request from Interlibrary Loan	ILLiad link for books and book items	true	Getit & How To Getit	...

Configuration > Fulfillment > Discovery Interface Display Logic > General Electronic Services

Broker Requests: Request Pushing Method

- Create a link in Primo that directs patrons to the broker system
- Configured on the Parameters tab of the Resource Sharing Partner record
- Options for Open URL or Link method

GENERAL INFORMATION

User identifier type *

User identifier regex

Broker system NCIP URL

Disable service when Never
 When resource is owned by the campus
 When resource is owned by the campus and available
 When resource is owned by the institution
 When resource is owned by the institution and available

Request pushing method * Open URL Link

URL template

Enable service for guest user No Yes

Broker Requests: Export to Third Party

- Configured on the Parameters tab of the Resource Sharing Partner record
- Primarily used in a “partner of last resort” workflow
- If a borrowing request cannot be filled by peer-to-peer or fulfillment network partners, it can be exported to a broker system

EXPORT TO THIRD PARTY

Export to third party No Using API Using email

URL *

Export request ID name tag

Close request when exported

API key *

Agenda

- Introduction
- NCIP Messages
- Request Creation
- **Partner Configuration**
- Demo

Partner Configuration: General Information

General Information | Contact Information | Parameters | Notes | Attachments

Code * **BROKER** Name * **Demo Broker Partner**

Profile Type * **NCIP** ← **NCIP Communication** Status **Active**

System Type * **ILLiad** ← **Broker System**

Average Supply Time **0** Delivery Delay (days) **0**

Currency Alternate Symbol

Locate Profile

Default Partner

Supports Borrowing **Borrowing and Lending Workflows are optional and may be limited** Borrowing Workflow **NCIP Borrowing**

Supports Lending Lending Workflow **NCIP Lending**

New Request Alert

Fulfillment > Resource Sharing > Partners

Partner Configuration: Parameters

- Configure options for how different NCIP messages will be processed
- Options may vary depending on broker system type
- Key elements:
 - Default location for lending/borrowing
 - User identifier type

Agenda

- Introduction
- NCIP Messages
- Request Creation
- Partner Configuration
- **Demo**

Lending: CheckOutItem

- Item is processed and ready to be shipped
- CheckOutItem message will include:
 - AgencyID: TRAINING_2_INST
 - ApplicationProfileType: BROKER
 - ItemIdentifierValue: 2051387760
 - RequestIdentifierValue: ExternalID123
 - DesiredDateDue: 2025-05-31

Lending: CheckInItem

- Item is received back at lender
- CheckInItem message will include:
 - AgencyID: TRAINING_2_INST
 - ApplicationProfileType: BROKER
 - ItemIdentifierValue: 2051387760

Borrowing: AcceptItem

- Item is received for borrowing
- AcceptItem message will include:
 - AgencyID: TRAINING_2_INST
 - ApplicationProfileType: BROKER
 - RequestIdentifierValue: ExternalIDabc
 - UserIdentifierValue: pjackson
 - ItemIdentifierValue: ItemID1
 - DateForReturn: 2025-05-31
 - BibliographicDescription: Title, Author, etc.

Borrowing: CheckInItem

- Item is returned to lender
- CheckInItem message will include:
 - AgencyID: TRAINING_2_INST
 - ApplicationProfileType: BROKER
 - ItemIdentifierValue: ItemID1



Additional Resources

Documentation and Training

- [Broker-Based Resource Sharing](#)
- [Configuring Alma/Broker Integration](#)
- [NCIP Partner Parameters](#)
- [Developer Network](#)
- [General Electronic Services](#)

Managing Electronic Resources Series Starts March 19

Managing Electronic Resources is a course of ten 60-minute sessions regarding many aspects of managing electronic resources in your institution's Alma service.

The course is structured as follows:

- Sessions ERM-101, -102, and -103: A general overview, and basic training in ordering and activating e-resources. Good for library staff who have used Alma before but not for e-resources.
- Sessions ERM-201, -202, -203: Tools for maintaining e-resources, troubleshooting broken links in your discovery service, and conducting overlap analysis. Pre-requisites are Sessions ERM-101, -102, and -103, or experience ordering and activating electronic collections and portfolios.
- Sessions ERM-301 and -302: Advanced tools to track usage statistics, COUNTER data, SUSHI harvesting, and Alma's Analytics tool. Assumes an understanding of all workflows in the ERM-100-level and ERM-200-level sessions (above), as well as familiarity with Alma's Design Analytics tool.
- ERM Bonus 1 and 2: Specialized tools for contributing records to the Community Zone, and uploading holdings for a specific collection: Ebook Central Perpetual, DDA and Subscription Titles. Assumes an understanding of all workflows in the 100-level sessions (above).



https://knowledge.exlibrisgroup.com/Alma/Training/Webinars/Managing_Electronic_Resources



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when you close the WebEx meeting

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