Adding P2P Partners from the Resource Sharing Directory

Downloading a P2P Partner from the Resource Sharing Directory

To download a new P2P partner and add them to the rota template, follow the instructions below:

1. In Alma, go to **Fulfillment > Resource Sharing > Partners**
2. Choose the **Community** tab
3. Search for the relevant partner. In this view, you can search for the partner by **Description**, **Name**, **Pods I'm Part Of**, or **Symbol**
4. Once you've found the correct institution, click on the box next to their name to checkmark the profile. Then click **Copy** on the top right-hand corner OR click on the **ellipsis button (...)** next to their name, then choose **Copy.** By copying them to your instance of Alma, you have downloaded both the institution's Partner Profile and Locate Profile.
5. To add them to the rota, go to **Fulfillment > Resource Sharing > Rota Templates**
6. Find the appropriate Rota from the list. Click on the **ellipsis button (...)**, then choose **Edit**
7. Choose the **Template Members** tab
8. Click + **Add Partners** on the top right-hand corner. Then search for the relevant partner, and click **Add Partners**
9. Then choose the **Save** button at the top right-hand corner to save the rota template

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Add Partner to the Temporary Item Creation Rule

The Temporary Item Creation Rule assigns a specific location and item policy to item records borrowed by your patrons from your P2P libraries. Adding the new partner to the list in the Temporary Item Creation Rule guarantees that items borrowed from your new P2P library will be given the correct location and item policy.

1. In Alma go to **Configuration**. Choose your designated Resource Sharing Library (for most WRLC institutions, it is your main library) from the drop down menu, then **Fulfillment > Library Management > Temporary Item Creation Rules**
2. Choose the temporary item creation rule that your Library uses for P2P partners. Click on the **ellipsis button (...)**, then choose **Edit**
3. Under **Input Parameters**, edit the **Parameter Resource Sharing Partner | In List**
4. Add your new P2P institution to the list, then click **Save** to save the input parameter
5. Click **Save** again to save the entire temporary item creation rule

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Add Partner to your P2P Terms of Use (TOU)

1. In Alma go to **Configuration**. Choose your designated Resource Sharing Library (for most WRLC institutions, it is your main library) from the drop down menu, then **Fulfillment > Physical Location > Fulfillment Units**
2. Choose the Fulfillment Unit your Library uses for P2P from the list. Click on the **ellipsis button (...)**, then choose **Edit**
3. Choose the **Fulfillment Unit Rules tab**. Then choose the Rule Type of **Lending Resource Sharing** from the drop down menu.
4. Edit the appropriate rule from the Institution Rules List (for the original participants of the SUNY pilot project, it will be called **SUNY Lending**
5. Under **Input Parameters**, edit the **Parameter Resource Sharing Partner | In List**
6. Add your new P2P institution to the list, then click **Save** to save the input parameter
7. Click **Save** again to save the entire fulfillment unit rule
8. Then click **Save** again to save the entire fulfillment unit

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Review the Partner Profile

It is always best practice to review the information in a recently downloaded partner profile, just to make sure that the correct configurations are in place. Workflows and Expiry times will vary depending on the set agreements between borrowing institutions; you will want to find out what these settings should be before making changes to partner profiles.

1. In Alma, go to **Fulfillment > Resource Sharing > Partners**
2. Find the relevant institution under the **Institution** tab (this is the tab that automatically appears when first opening this page). Click on the **ellipsis button (...)**, then choose **Edit**
3. Under the **General Information** tab, choose the appropriate **Borrowing** and **Lending Workflows** from the drop-down menu. These settings will vary depending on your agreement with the institution.
4. Under the **Parameters** tab, make sure the **Request Expiry** option is correct, as well as the **Expiry Time**. These settings will vary depending on your agreement with the

institution.

> A partner's Expiry Time setting determines how long you have to respond to lending requests from that partner. If a lending request from that partner isn't updated to shipped within the expiry period, the request will be automatically rejected the next time the Expired Resource Sharing Requests job runs (it runs daily at 2:00am). For instance, if a partner has an Expiry Time setting of 4 days and you receive a request from them on a Monday at 10:00am, the expiry period will end on Friday at 10:00am, and the request will be automatically rejected at 2:00am on Saturday.

5. Then choose the **Save** button at the top right-hand corner to save the edited partner profile

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Review the Locate Profile

It is also best practice to review the information in a recently downloaded locate profile, just to make sure that the correct configurations are in place. These settings will vary depending on the set agreements between borrowing institutions; you will want to find out what these settings should be before making changes to locate profiles.

1. In Alma, go to **Configuration > Fulfillment > Resource Sharing > Locate Profiles**
2. Find the relevant institution in the list. Click on the **ellipsis button (...)**, then choose **Edit**
3. Choose the **Locate Profile Parameters** tab
4. Check the settings (for example, **Ignore Electronic and Digital Resources**) to make sure these are correct. These settings will vary depending on your agreement with the institution.
5. Then choose the **Save** button at the top right-hand corner to save the edited locate profile

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Check other relevant configurations

1. Make sure the **Expired Resource Sharing Requests** job is running daily (especially if you have configured Expiry Time)
   1. Go to **Configuration > Fulfillment > General > Fulfillment Jobs Configuration**
   2. Check to see that the **Expired Resource Sharing Requests** is Active and running everyday.
2. Make sure the **Resource Sharing Working Days** list includes the days your staff do not process ILL
   1. Go to **Configuration > Fulfillment > Resource Sharing > Resource Sharing Working Days**
   2. Add the days of the week your staff do NOT process ILL to the list
   3. Then click **Save**

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