Configuring Peer to Peer Resource Sharing in the IZ

To fully configure peer to peer resource sharing, you will need to configure the following:

- Resource Sharing Library
- Temporary Resource Sharing Locations
- Resource Sharing Jobs
- Other Resource Sharing Settings
- Workflow Profiles
- Resource Sharing Partner
- Item Policy
- Temporary Item Creation Rule
- Fulfillment Policies
- Loan and Lending Resource Sharing TOUs
- Fulfillment Unit Rules
- Rota Template
- Rota Assignment Rule
- Sending Borrowing Request Rule

All names and descriptions listed in this document are merely suggestions. You may use whatever names and descriptions work best for your library.

You will need the **Fulfillment Administrator** and **Resource Sharing Partners Manager** roles to do this configuration work. All configuration work should be done at the institution level.

Resource Sharing Library

Your resource sharing library is the library where your temporary borrowing and lending locations are housed. It is possible to use your main library as your resource sharing library, or you can use the stand-alone resource sharing library that was created by Ex Libris. If you use the stand-alone resource sharing library, there will be a transit step between your main library and the resource sharing library whenever you receive or return a resource sharing item. If you use your main library as your resource sharing library, there is no transit step.

As a frame of reference, WRLC's AFN / CLS process uses your institution's Main Library , NOT the r esource sharing library created by Ex Libris.

1. Go to Configuration, select the library you want to be your resource sharing library from the Configuring dropdown, and then go to Fulfillment | Library Management | Library Details.

2. Scroll down to the Resource Sharing Information section and make sure the Is Resource Sharing Library box is checked. Also, make sure your OCLC symbol is listed in the Symbol field.

3. Scroll down to the Borrowing Information section and check the Cancel Request on Locate Failure and Automatically Activate Locate Profile boxes. Next, select your temporary borrowing location from the Default Location dropdown (see the next section if no temporary borrowing location has been configured). Lastly, select the library that you would like to serve as your default pickup location from the Default Pickup Location dropdown.

4. Scroll down to the Lending Information section and check the Automatically Locate Resource, Reject Request When No Available Items, Reject Request When No Requestable Items, Reject Request When Only Electronic Available, Ignore Electronic Resources, and Automatic Creation boxes. Next, select your temporary lending location from the Default Location dropdown (see the next section if no temporary borrowing location has been configured).

5. Scroll down to the bottom of the page, check the Locate By Fields box, click the No button, and then check the Title, Author, ISBN/ISSN, System Control Number, and LCCN (010) boxes.

6. Click the Save button.

Temporary Resource Sharing Locations

Temporary item records for items borrowed from other libraries will be housed in your temporary borrowing location, and items loaned to other libraries will be temporarily moved to your temporary lending location.

As a frame of reference, WRLC's AFN / CLS process uses CLSBORR and CLSLEND as your Institution's temporary resource sharing locations.

1. Go to Configuration, select the library you've designated as your resource sharing library, and then go to Fulfillment | Locations | Physical Locations.

2. Click the Add Location link, enter the values in the first row of the table below into the window that opens, and then click the Add Location button. Repeat that process using the values in the second row of the table.

Code	Name	External Name	Type	Remote Storage	Fulfillment Unit	Call Number Type	Map
BORROWING	Borrowing	Borrowing	Open	leave blank	Select value ending in "_FU"	leave blank	leave blank
LENDING	Lending	Lending	Open	leave blank	Select value ending in "_FU"	leave blank	leave blank

3. Go to Fulfillment | Locations | Physical Locations, click the ellipsis next to your Borrowing location, scroll down to the Physical Location Circulation Desk List section, click the Attach Existing Circulation Desk link, select your resource sharing library's circulation desk, make sure the Check In, Check Out, and Reshelve boxes are checked, click Attach Existing Circulation Desk, and then click the Save button. Repeat this process for your Lending location.

Resource Sharing Jobs

This job must be running in order for resource sharing requests to automatically move on to the next lender if they're not filled within the expiry days value listed in the resource sharing partner.

1. Go to Configuration | Fulfillment | General | Fulfillment Jobs Configuration, switch the status of the Expired Resource Sharing Requests job to Active, select Every Day at 02:00 from the Schedule dropdown, and then click the Save button.

Other Resource Sharing Settings

Setting	**Value**
ill_item_creation_lib_code	the code for your resource sharing library
ill_item_creation_location_code	the code for your temporary borrowing location
rs_allow_actions_on_scan_in	true
rs_auto_request_lending	true
rs_disable_borrowing_auto_assign	true

rs_disable_lending_auto_assign	true

Workflow profiles

Workflow profiles help determine how resource sharing requests behave.

1. Go to Configuration | Fulfillment | Resource Sharing | Workflow Profiles.

2. Click the Add Workflow Profile link, enter “Peer to Peer Borrowing” into the Workflow Profile field, leave the Type dropdown set to Borrowing, check the boxes listed below, and then click the Add and Close button.

Automatic renew, Cancelled By Patron, Cancelled by partner, Cancelled by staff, Conditional, Lender check in, Manual renew, Reject, Renew requested, Request accepted, Will supply

3. Click the Add Workflow Profile link again, enter “Peer to Peer Lending” into the Workflow Profile field, switch the Type dropdown to Lending, check the boxes listed below, and then click the Add and Close button.

Borrower recall, Cancel reply, Conditional, Lender check in, Patron renewal, Staff renewal

Resource Sharing Partners

Resource sharing partners allow Alma institutions to send resource sharing requests to each other.

1. From the main Alma screen, go to Fulfillment | Resource Sharing | Partners, click the Community tab, change the search dropdown from Description to Name, and search for the partner, click the ellipsis next to their name, and then click Copy.

2. Click on the Institution tab, click the ellipsis next to the partner's name, and click Edit.

3. Select the workflow profiles you configured from the Borrowing Workflow and Lending Workflow dropdowns.

4. Click the Parameters tab, change the Expiry Time (Days) setting to the appropriate number, and then click the Save button.

Item Policy

This Item Policy will be added to the temporary records Alma will create for the items you borrow from SUNY. This configuration work must be done at the resource sharing library level.

1. Go to Configuration, select your resource sharing library from the Configuring dropdown, and then go to Fulfillment | Physical Fulfillment | Item Policy.

2. Click the Add Row button. The Item Policy configuration window will open.

3. Configure the Item Policy as shown in the image below and then click Add Row. Once the Item Policy configuration window closes, click the Save button.

Temporary Item Creation Rule

This Temporary Item Creation Rule will add the Item Policy you previously configured to the temporary item records Alma will create for the items you borrow from your peer-to-peer lending institutions. It will also determine the temporary item record's location. This configuration work must be done at the resource sharing library level.

1. Go to Configuration, select your resource sharing library from the Configuring dropdown, and then go to Fulfillment | Library Management | Temporary Item Creation Rules

2. Click the Add Rule button

3. Configure the Temporary Item Creation Rule to have the following input parameters

Name = Resource Sharing Partner

Operator = InList

Value = [List of Resource Sharing Partners]

4. Make sure this rule is positioned at the top of your Temporary Item Creation rules list.

Fulfillment Policies

These fulfillment policies will be used in the Loan and Lending Resource Sharing TOUs you will configure for items borrowed from and loaned to your peer-to-peer lenders. This configuration work should be done at the institution level.

Please contact your lending partners to determine the values necessary for your fulfillment policies.

1. Go to Configuration, select your institution from the Configuring dropdown, and then go to Fulfillment | Physical Fulfillment | Advanced Policy Configuration.

2. Click the Add Fulfillment Policy button, select the type of policy you would like to configure, configure the relevant policies, and then click the Save button.

Note: If you already have policies configured for these resource sharing partnerships, there's no need to configure additional policies. You can use the policies you've already configured.

Loan, Borrowing, Resource Sharing, and Lending Resource Sharing TOU's

These TOUs will determine the loan and renewal periods for the items you borrow from and loan to your peer-to-peer partners. They will also determine which user groups are allowed to submit borrowing requests in Primo. This configuration work should be done at the institution level.

Please contact your lending partners to determine the values necessary for your fulfillment policies.

1. Go to Configuration, select your institution from the Configuring dropdown, and then go to Fulfillment | Physical Fulfillment | Terms of Use and Policies.

2. Click the Add a Terms of Use button.

3. Click the Loan button and then click the Next button.

4. Select the relevant policies in the table below, click the Next button, and then click the Save button.

5. Click the Add a Terms of Use button again.

6. Click the Lending Resource Sharing button and then click the Next button.

7. Select the relevant policies in the table below, click the Next button, and then click the Save button.

8. Click the Add a Terms of Use button again.

9. Click the Borrowing Resource Sharing button and then click the Next button.

10. Select the relevant policies in the table below, click the Next button, and then click the Save button.

Fulfillment Unit Rules

These fulfillment unit rules will determine which Loan and Lending Resource Sharing TOUs are assigned to the items you borrow from and lend to your peer-to-peer partners. This configuration work must be done at the resource sharing library level.

1. Go to Configuration, select your resource sharing library from the Configuring dropdown, and then go to Fulfillment | Physical Fulfillment | Fulfillment Units

2. Click the ellipsis next to your resource sharing fulfillment unit and then click Edit.

3. Click the Fulfillment Unit Rules tab, select “Loan” from the Rule Type dropdown, and then click the Add Rule button.

4. Configure the Loan fulfillment unit rule to use your newly created Item Policy, then click the Save button.

5. Make sure the Loan fulfillment unit rule you’ve configured is positioned above any other Loan fulfillment unit rules that could potentially be applied to items borrowed from your peer-to-peer partners and then click the Save button.

6. Click the ellipsis next to your resource sharing fulfillment unit and then click Edit.

7. Click the Fulfillment Unit Rules tab, select “Lending Resource Sharing” from the Rule Type dropdown, and then click the Add Rule button.

8. Configure the Lending Resource Sharing fulfillment unit rule as shown in the image below and then click the Save button.

9. Make sure the Lending Resource Sharing fulfillment unit rule you’ve configured is positioned above any other Lending Resource Sharing fulfillment unit rules that could potentially be applied to items loaned to your peer-to-peer partners and then click the Save button.

10. Click the ellipsis next to your resource sharing fulfillment unit and then click Edit.

11. Click the Fulfillment Unit Rules tab, select “Borrowing Resource Sharing” from the Rule Type dropdown, and then click the Add Rule button.

12. Configure the Borrowing Resource Sharing fulfillment unit rule as shown in the image below (when configuring the input parameter, select the user groups you want to be able to submit borrowing requests) and then click the Save button.

13. Make sure the Borrowing Resource Sharing fulfillment unit rule you've configured is positioned above any other Borrowing Resource Sharing fulfillment unit rules that could potentially prevent users from submitting borrowing requests.

Rota Template

This Rota Template will determine which peer-to-peer libraries are added to your request rotas. This configuration work must be done from the main Alma page, not the Configuration page.

1. Go to Fulfillment | Resource Sharing | Rota Templates

2. Click the Add Template button.

3. Configure the Rota Template and then click the Save and Add Members button.

4. Click the Add Partners button, select your peer-to-peer partners, and then click the Save Button.

Rota Assignment Rule

This Rota Assignment Rule will determine where peer-to-peer libraries will be positioned in your request rotas. This configuration work should be done at the institution level.

1. Go to Configuration, select your institution from the Configuring dropdown, and then go to Fulfillment | Resource Sharing | Rota Assignment Rules.

2. Click the Add Rule button.

3. Configure the Rota Assignment Rule according to the terms of your lending agreement, and then click the Save button.

4. Make sure the Rota Assignment Rule is positioned at the top of your rota assignment rules list.

Sending Borrowing Request Rule

This rule will make sure borrowing requests assigned to your peer-to-peer libraries are sent automatically. This configuration work may not be necessary given how your other Sending Borrowing Request rules are configured. This configuration work should be done at the institution level.

1. Go to Configuration, select your institution from the Configuring dropdown, and then go to Fulfillment | Resource Sharing | Sending Borrowing Request Rules.

2. Click the Add Rule button.

3. Configure the Sending Borrowing Request rule according to the terms of your lending agreement, and then click the Save button.

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