Can we talk? 
Alma and ILLiad integration options.

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Whitman College

https://www.flickr.com/photos/kitcowan/2103850699
How it’s operated

- ILLiad sends bib info and loan info to Alma (ILLiad as lender via NCIP)

- Alma sends request to ILLiad to process (ILLiad as supplier of last resort)
Benefits

- Patrons don’t need to know the difference between Summit and Interlibrary Loan requests
- Unified request form
- All patron requests show in their Primo account
- All patron's checked out materials show in their Primo account
- Seamless transition and integration in Alma
- Statistics available in Alma analytics on Summit and ILL
What’s possible?

- **LENDING**
  - Automatically set a temporary location and create a resource sharing request for items lent via ILLiad
  - Automatically remove the temporary location and close the resource sharing request for items lent via ILLiad when the item has been returned by the borrowing library

- **BORROWING**
  - Export failed requests to ILLiad for ILL processing
  - Automatically create temporary item records and hold requests in Alma for items borrowed in ILLiad
  - Use Alma to check ILLiad items in/out
  - Automatically remove temporary item records and hold requests in Alma when items are returned to lending libraries
Lending via ILLiad

- Process in ILLiad
  - Add barcode to Ref Num field in request via customized Primo AddOn
Lending via ILLiad

- NCIP sent to Alma creates RS request, moves item to temporary location and temporary item policy.
ILLiad as supplier of last resort

Borrowing Process Overview

1. Patron
2. Search In
3. Worldcat
4. Primo
5. Create a resource sharing request
6. Summit
7. ROTA
8. OpenURL
9. Process in Summit
10. Found
11. Not Found
12. Fall back to ILLiad processing
Borrowing – Patron side
ILLiad Borrowing Process Overview

1. Create a resource sharing request
2. Summit ROTA
   - Found
   - Not Found
3. Process in Summit
4. Fall back to ILLiad processing
   - Auto Receive On
5. Auto Receive Off
6. Interlibrary Loan request gets processed in ILLiad
7. ILLiad will check email and create request
8. Alma sends an email with citation information
9. ILLiad as last resort
Borrowing – Staff Side

- Exported to an email account
- ILLiad checks email and transfers citation information into a new ILL request
  - Fallback Summit processing queue
- Process as usual in ILLiad (but don’t send to Summit libraries)
Check-In from lending library in ILLiad, continue ILLiad processing
NCIP notification to Alma creates borrowing request
Auto-receive notifies patron, puts item on hold shelf
Manual receive processing mirrors Summit processing
  - Alma puts item on hold shelf and sends pick-up notice
Patron’s interaction

- Create a resource sharing request
- Summit ROTA
  - Found
  - Not Found
    - Process in Summit
    - Fall back to ILLiad processing

Patron
Considerations

- What are your loan rules for ILL items? We use 6 weeks, 6 days. There is NOT an easy way to use the lending library due date.
- Where will your email notifications come from? We use Alma notices for automation but lose unique info in ILLiad notices.
- Patron accts in ILLiad
- Time for delivery expectations
- Think about statistics ahead of time
In Alma, configure:

- Resource sharing partner
- TOU
- Item policy
- Location
- Temporary item creation rules

In ILLiad, install NCIP add-on and configure Email import.
### ILLiad Add-ons

<table>
<thead>
<tr>
<th>Name</th>
<th>Author</th>
<th>Version</th>
<th>Active</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALMA_NCIP_Client</td>
<td>Tom McNulty, VCU Libraries</td>
<td>2.0</td>
<td></td>
<td>This system level add-on allows for ILLiad to communicate with Alma via NCIP protocol.</td>
</tr>
<tr>
<td>Amazon Book Searches</td>
<td>Atlas Systems, Inc.</td>
<td>1.1</td>
<td></td>
<td>Performs an Amazon search for the LoanTitle for loans.</td>
</tr>
<tr>
<td>Ex Libris Alma_Primo</td>
<td>Kun Lin from DDS Project</td>
<td>1.2</td>
<td></td>
<td>Searches Ex Libris Alma/Primo Catalog for ISSN or Title for loans and articles and allows for input of Call Number and Location for details of the request.</td>
</tr>
<tr>
<td>Google Scholar Search</td>
<td>Atlas Systems, Inc.</td>
<td>1.1</td>
<td></td>
<td>Performs a Google Scholar search for the PhotoArticleTitle for articles.</td>
</tr>
<tr>
<td>Google Search</td>
<td>Atlas Systems, Inc.</td>
<td>1.1</td>
<td></td>
<td>Performs a generic Google search for the LoanTitle for loans and the PhotoArticleTitle for articles.</td>
</tr>
<tr>
<td>Shipment Tracking</td>
<td>Atlas Systems, Inc.</td>
<td>1.1</td>
<td></td>
<td>Displays tracking information based on a given tracking number.</td>
</tr>
<tr>
<td>Training</td>
<td>Atlas Systems, Inc.</td>
<td>1.1</td>
<td></td>
<td>Loads the Alma Systems Training site into a tab on the main form.</td>
</tr>
</tbody>
</table>

#### ALMA_NCIP_Client Setting Table

<table>
<thead>
<tr>
<th>Setting Name</th>
<th>Value</th>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>NCIP_Responder_URL</td>
<td><a href="https://host1.illiaid.com/NCIPServlet/NCIPServlet">https://host1.illiaid.com/NCIPServlet/NCIPServlet</a></td>
<td>str</td>
<td>This setting value is the address for the NCIP Responder URL. For Alma this will always be <a href="https://alma.edlibgroup.com/view/NCIPServlet">https://alma.edlibgroup.com/view/NCIPServlet</a> unless you are testing on a sandbox version of Alma.</td>
</tr>
<tr>
<td>acceptItem_from_uniqueAgency</td>
<td>ILLC, ALLIANCE, WHITE, ILN</td>
<td>str</td>
<td>This is your institutional Alma Code.</td>
</tr>
<tr>
<td>ApplicationProfileType</td>
<td>ILL</td>
<td>str</td>
<td>Input the Resource Sharing Partner code used in Alma.</td>
</tr>
<tr>
<td>BorrowingAcceptItemFailQueue</td>
<td>NCIP Error: BorrowingAcceptItemFailQueue</td>
<td>str</td>
<td>This designates the name of the queue a Borrowing Transaction will be moved to if the BorrowingAcceptItem function fails.</td>
</tr>
<tr>
<td>BorrowingCheckedOutItemFailQueue</td>
<td>NCIP Error: BorrowingCheckedOutItemFailQueue</td>
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<td>This designates the name of the queue a Borrowing Transaction will be moved to if the BorrowingCheckedOutItem function fails.</td>
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<tr>
<td>LendingCheckOutItemFailQueue</td>
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<td>This designates the name of the queue a Lending Transaction will be moved to if the CheckOutItem function fails.</td>
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<td>str</td>
<td>This designates the name of the queue a Lending Transaction will be moved to if the CheckOutItem function fails.</td>
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<tr>
<td>Enable Patron Borrowing Returns</td>
<td>Yes</td>
<td>str</td>
<td>When this setting is enabled, patron returns will go through ILLiad and a message is sent to Alma. When this is disabled, patron returns will go through Alma and will need to allow be returned through Alma.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Setting Name</th>
<th>Value</th>
<th>Type</th>
<th>Description</th>
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<tr>
<td>Prefix for Library Use Only</td>
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<td>str</td>
<td>This setting allows you to change the prefix of a transaction that is marked Library Use Only Yes.</td>
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<tr>
<td>Prefix for Renewables Allowed</td>
<td>TN-</td>
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<td>This setting allows you to change the prefix of a transaction that is marked Renewables Allowed Yes.</td>
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<tr>
<td>Prefix for Library Use Only and Renewables Allowed</td>
<td>LU-</td>
<td>str</td>
<td>This setting allows you to change the prefix of a transaction that is marked both Library Use Only and Renewables Allowed Yes.</td>
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### Configurations – Customization Manager

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<td>Publisher:</td>
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<td>Borrowing</td>
<td>Transactions</td>
<td>PhotoJournalInclusivePages</td>
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<td>Transactions</td>
<td>PhotoArticleAuthor</td>
<td>Author of Article:</td>
<td></td>
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<tr>
<td>16</td>
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<td>Borrowing</td>
<td>Transactions</td>
<td>PhotoArticleTitle</td>
<td>Title:</td>
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</table>
Author: Yang, Gene Luen, author.
Title: Avatar, the last airbender.
ISBN/ISSN: 1616552972
OCLC Number: 876169127
Publication Date: 2014.
Specific Edition Only: true
Requester: [redacted]
Requested Format: PHYSICAL
Requested Media: Any
Allow Other Format: false
Requested Pickup location: Whitman College Library
For Reading-Room Use Only: false
Willing to Pay: false
Agree to Copyright terms: true
Needs Patron Information: false
External ID: 01ALLIANCEWHITCOM004275
Institution: Whitman College
Resource Sharing Partner - Alma

![Resource Sharing Partner Interface](image)
## Rota Assignment Rule - Alma

<table>
<thead>
<tr>
<th>Enabled</th>
<th>Move Up</th>
<th>Move Down</th>
<th>Rule Name</th>
<th>Description</th>
<th>Updated By</th>
<th>Update Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
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<td></td>
<td>Article Only Rota</td>
<td>-</td>
<td>Lin, Kun</td>
<td>05/17/2016</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td>Summit 3 Rota</td>
<td>-</td>
<td>Lin, Kun</td>
<td>05/17/2016</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td>[Link to rule]</td>
<td>-</td>
<td>Lin, Kun</td>
<td>05/17/2016</td>
</tr>
</tbody>
</table>
## Sending Rules - Alma

### Sending Borrowing Request Rules List

**Institution Rules List**
You are configuring: Whitman College

**Sending Borrowing Request Rule**
- **Name**: ILLiad Request
- **Description**: 
- **Created By**: Lin, Kun  
  **Updated By**: Lin, Kun
- **Created On**: 09/09/2015
- **Updated On**: 06/28/2015

### Input Parameters

<table>
<thead>
<tr>
<th>Name</th>
<th>Operator</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>ILLiad Requests</td>
</tr>
</tbody>
</table>

### Output Parameters

<table>
<thead>
<tr>
<th>Name</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send Request</td>
<td>True</td>
</tr>
</tbody>
</table>
## Temporary Item Creation Rule - Alma

### Temporary Item Creation

- **Name**: ILL Short Loan
- **Description**: 
- **Created By**: Lin, Kun
- **Created On**: 10/15/2016
- **Updated By**: Carter, Julie
- **Updated On**: 07/08/2016

### Input Parameters

<table>
<thead>
<tr>
<th>Name</th>
<th>Operator</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource Sharing Partner</td>
<td>=</td>
<td>ILLiad Requests</td>
</tr>
<tr>
<td>Days Until Due Date</td>
<td>Less than</td>
<td>10</td>
</tr>
</tbody>
</table>
Impact

- Number of requests exported to 3rd party – 378 borrowing requests
  - 17% were not picked up/returned immediately
- ILL borrowing rates have continued to fall
  - 2014-2015, 3711 requests
  - 2015-2016, 2627 requests, 29% decrease
Thank You!!

Kun Lin link@whitman.edu
Julie Carter carterja@whitman.edu