

ILLiad Alma Webinar

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Agenda

Welcome:

- ILLiad-Alma Resource Sharing
- NCIP Addons

Lending

Borrowing

Addons Configuration

Alma Configuration

Other items still in the works

Follow Up Sessions on Configuration

Webinars:

- Monday, March 4 at 2:00pm
- Thursday, March 14 at 1:00pm

IDS Regional User Group Meetings:

- Eastern - May 22 (Hudson Valley CC)
- Western - May 21 (SUNY Geneseo)
- Metro - May 23 (Hunter College)

Common Terms

- NCIP = Circulation Interchange Protocol
- Add-on = a config file and Lua file that work together to create brief bibs, place items on Hold, move Lending items in Alma, or renew borrowed items.
- Lua file = computer code (file) used to perform fulfillment functions.
- Config file = a file that has library-specific configurations used by the Lua file. The Config file looks for the Lua file name.

Lending

Lending Addon & Other Things You Need



- 1) **NCIP/ILLiad configuration in Alma**
- 2) **NCIP Addon**
- 3) **Barcode Field** - In the Client (ReferenceNumber)
- 4) **IDS Logic** - import barcode from ALMA into your barcode designated field

Item Information	
Call Number	362.76 Chi
Location	Nazareth Main Collection book
Availability	AVAILABLE
Reference Number	3276903109998
Due Date	5/12/2019


Lending Addon & Other Things You Need

5) **Barcode Printed on your Pull Slips** - ensures you pull the correct Copy of an item (ex. think multiple copies of Harry Potter & the Goblet of Fire)

Title: *Fundamentals of taxation 2017 /*
Author:
Publisher: New York : McGraw-Hill Education,
©2017. ©2017

BARCODE: 3276903862423

CALL # **336.200973 Fun**
Nazareth Main Collection book

XNC TN: **518050** 

Nazareth ILL Office: (585) 389-2184
nazill@naz.edu

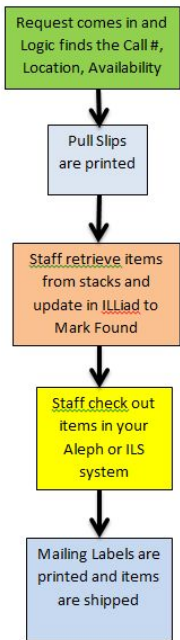


Lending Addon & Other Things You Need

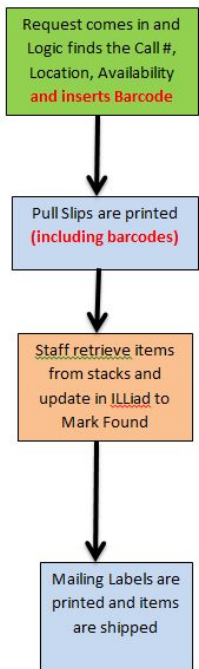
6) **Terms of Use for Lending in Alma.** These should be set up for you.

Lending Workflow Comparison - Item Shipped

Pre-ALMA Workflow



Post-ALMA Workflow



NCIP Lending Addon sends data to Alma and items are updated to Lending Resource Sharing Requests

NOTE: The due date in Alma will be the due date in ILLiad

1 **A concrete introduction to higher algebra / Lindsay N. Childs.** External Identifier: 526941 Barcode: 3276903715253

Book (Book - Physical) By Childs, Lindsay. (New York : Springer c2009.)

Request Status: Shipped Physically

Resource Locate Status: Resource Located

Partner: RES_SHARE

ISBN: 9780387745275 and others

Request Date: 04/24/2019

Series: Undergraduate texts in mathematics.

Request Printed: No

Subject: Algebra.

Request Reported: No

MMS ID: 991001824329703876

Level of Service: Normal (Local)

Requested Format: Physical

Creation Date: 01/25/2019

Update Date: 01/25/2019

Alerts Physical (2) Electronic Digital [Other details](#)

1 PRINT BOOK

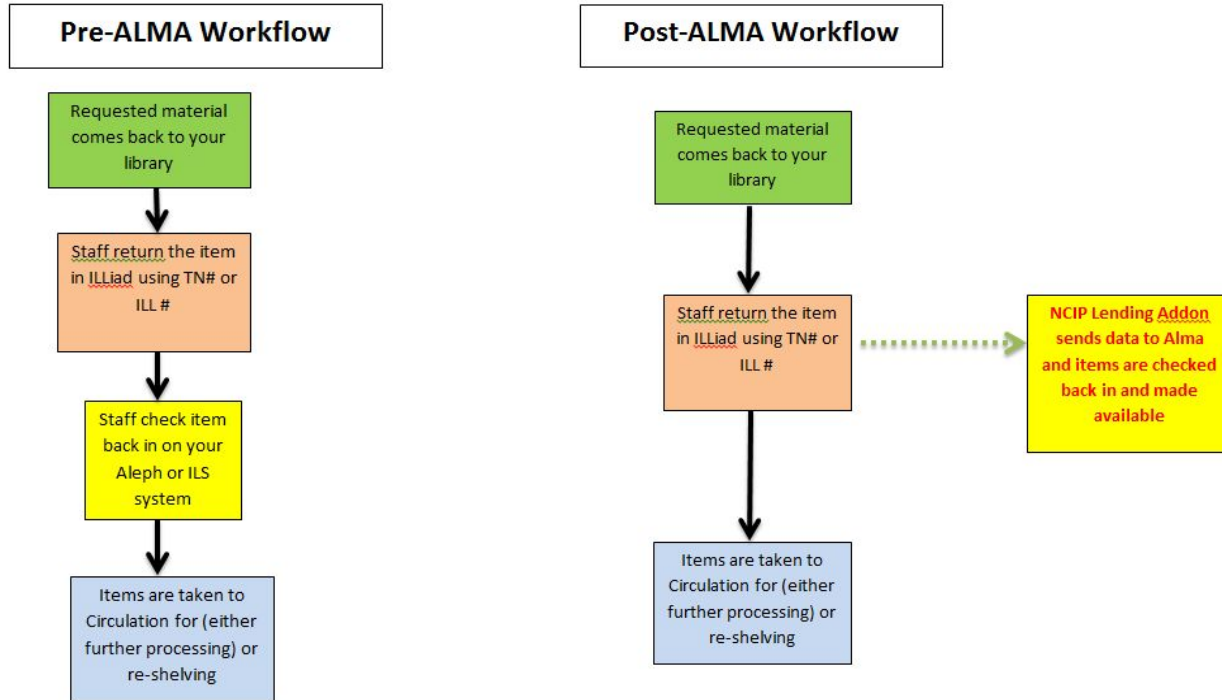
A concrete introduction to higher algebra

Lindsay. Childs 3rd ed.

c2009

Checked out from Lorette Wilmot Library Lending Resource Sharing Requests (512 Chi) >

Lending Workflow Comparison - Returned



Lending: NCIP Errors



A screenshot of a software interface showing a list of requests. The list is titled "Requests (1 items)". There is one item in the list: "NCIP Error: LCheckOut-User Ineligible" with a count of "1". A red oval highlights the entire list area.

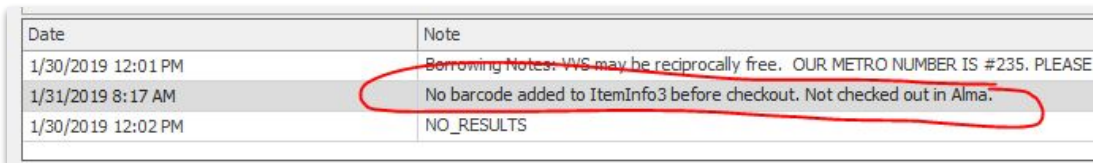
Requests (1 items)
NCIP Error: LCheckOut-User Ineligible 1

1) Why do they occur?

- Barcode missing, Barcode in wrong place, Barcode entered wrong

2) How to fix it?

- Fix the barcode
- Update to **Item Shipped** (again). Note: this will throw a connection error
 - Route then from **Awaiting Secondary Label Printing** to **Item Shipped** or set up a routing rule to do this.
- Or Update to **Returned** (again). Note: this will throw a connection error
 - Route then from NCIP Error queue to **Request Finished**



A screenshot of a table with two columns: "Date" and "Note". The table contains three rows of data. The second row's note is circled in red.

Date	Note
1/30/2019 12:01 PM	Borrowing Notes: WWS may be reciprocally free. OUR METRO NUMBER IS #235. PLEASE
1/31/2019 8:17 AM	No barcode added to ItemInfo3 before checkout. Not checked out in Alma.
1/30/2019 12:02 PM	NO_RESULTS

Lending: Prepare Now



- 1) Get your barcode field set up for importing
- 2) Start importing the barcodes
- 3) Add barcode field to your lending loan print templates



Lending Renewals

The screenshot shows the 'Resource Sharing Lending Requests Task List' interface. At the top, there are tabs for 'Assigned to Me', 'Unassigned', and 'Assigned to Others'. Below these is a search bar for 'External Request ID' with the value '520828' entered. A callout box points to this search bar with the text: '1. Enter TN number as ExternalRequestID'. Below the search bar are buttons for '+ Add', 'Refresh', 'Remove Alerts', and 'Remove Requests'. A status bar shows 'Activity Status: Active' and 'Due date: Up to a month ago'. A list of requests is shown below, with the first item selected. A callout box points to the 'Edit' button next to the first item with the text: '3. <click> Edit'. The details for the selected item are shown below the list. A callout box points to the 'Request Status' field with the text: '2. Check Status for Recalls'. A context menu is open over the 'Edit' button, with a callout box pointing to the 'Renew' option with the text: '4. <click> Renew'. The context menu options include: Renew, Manage Fulfillment Options, Duplicate, Reassign, Search, Detach from MMS, Checked In, Ship non-returnable, and Ship Item.

1. Enter TN number as ExternalRequestID

2. Check Status for Recalls

3. <click> Edit

4. <click> Renew

5. Select a date and <click> Okay

The screenshot shows the 'Renew' dialog box. It has a title bar 'Renew'. Below the title bar are two radio buttons: 'Accept renewal request' with 'Yes' selected and 'No' unselected. To the right is a 'Due date' field with a calendar icon. Below these are two text input fields: 'Internal note' and 'Note to partner'. To the right of these fields is a calendar for February 2019. The calendar shows the 4th of February selected. At the bottom right of the dialog is an 'OK' button.

Renew

Accept renewal request Yes No

Due date *

Internal note

Note to partner

February 2019

Su Mo Tu We Th Fr Sa

27 28 29 30 31 1 2

3 4 5 6 7 8 9

10 11 12 13 14 15 16

17 18 19 20 21 22 23

24 25 26 27 28 1 2

OK

Borrowing

This portion of the presentation will discuss borrowing workflows after the add-on is installed, configured and made active.



Ben Hogben, Ithaca College Library

Discussions Before Implementation

- Do you want users to check ILLiad, Alma or both to see what they have borrowed?
- Do you want users to be able to renew in Primo? Or, Primo and ILLiad? Or, just ILLiad?
- Do you want users to receive notices from ILLiad or Alma?

After Activating the Add-on:

Some items will be checked out in Alma, and some will be in ILLiad only (pre-addon):

Either:

1) Check all current items out in Alma by re-receiving with the addon (patrons will receive a notice when this happens; it may be a good idea to notify them ahead of time), and you will also see connection errors

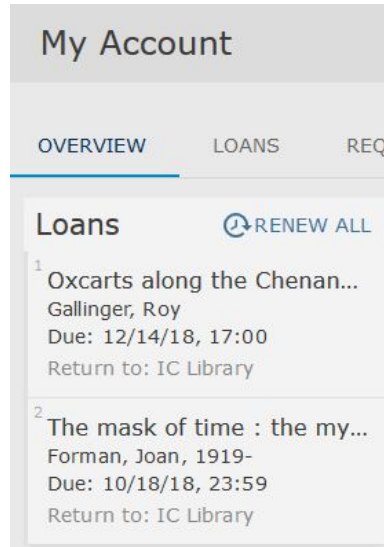
Or

1) "Return" all items in Alma regardless of if they were checked out in Alma or not, and update in ILLiad as needed

You may want to use the "Mark in transit" function in ILLiad to ensure that items are properly returned in ILLiad, as needed

Patron Benefits When Using the Borrowing Addon

- Users see all borrowed items in their Primo accounts, instead of checking Primo and ILLiad



Users can also Renew Items in Primo

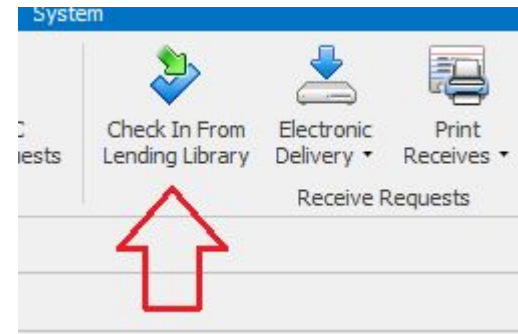
3 In a forest, a deer /
Ambal, 1944-

Due: 03/12/19, 17:00.

Return to: Library

The renew
request will be
handled by the
appropriate
library staff

How Does it Work?



- When an item is received in ILLiad, Alma creates a brief bib record, places the item on Hold, and notifies the user.

However....

Do you want the patron notified as soon as the item is received in ILLiad, or wait until the item is processed?

Default pickup library













 Receive Desk *

Scan in the item when ready to notify patrons

Workflow Changes using the Add-on

The borrowing add-on changes the work flow ***significantly***. Once the add-on is installed and made active, the borrowing queue in Alma “wakes up” (i.e., are populated with requests from ILLiad).

Note: staff will need the Fulfillment Services Manager role in Alma.

- [-] Requests (39 items)
 -  Awaiting Unfiled Processing
 -  Loans Recalled from Patrons
 -  Campus Delivery
 -  Awaiting Customer Response
 -  Request in Future
 -  Primary Extensive Search
 -  Invoiced Items
 -  OCLC Special Message: Overdue
 -  OCLC Special Message: Received?
 -  Awaiting Librarian Purchase Review
 -  Item Not Received
- [-] Requests (14 items)
 -  Second Renewal Granted

- Status** ▾
 - Loaned item to pa... (184)
 - Mediated Patron Re... (10)
 - Physically received ... (38)
 - Ready to be sent (1)
 - [+ More \(4\)](#)
- Active Partner** ▾
 - ILLiad (314)
- Creation Date** ▾
 - Older (142)
 - Today (8)
 - Up to a month ago (116)
 - Up to a week ago (36)
 - Yesterday (12)
- Update Date** ▾
 - Older (80)
 - Today (12)
 - Up to a month ago (105)
 - Up to a week ago (77)
 - [+ More \(2\)](#)
- Requested Format** ▾
 - Physical (314)
- Supplied Format** ▾
 - Physical (312)
 - Undefined (2)
- Due date** ▾
 - In the Future (260)
 - Older (5)
 - Today (1)
 - Undefined (2)
 - [+ More \(4\)](#)
- Last Interest Date** ▾
 - Older (2)
 - Undefined (312)
- Need patron information** ▾
 - No (313)

Borrowing

Borrowing Workflow Changes

No longer need to use Web Circ to check out ILL materials to users

Items are checked out using Alma

Items will still need to be moved to the “Checked out to Customer” queue if you plan on offering the renewal option in ILLiad

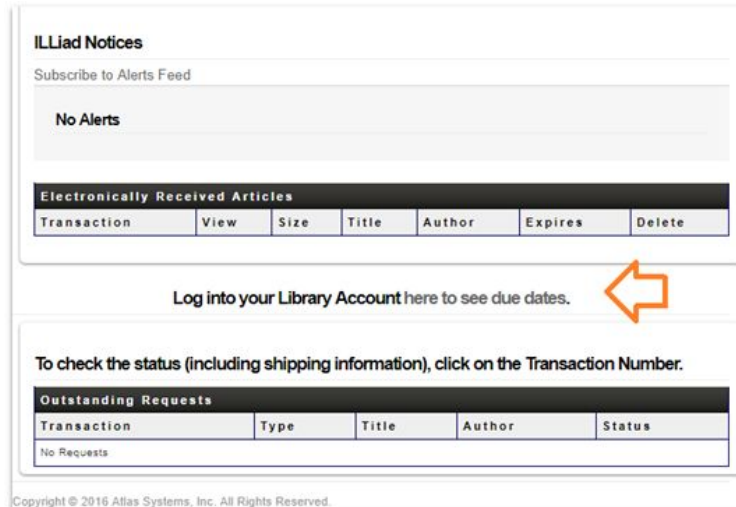
Determining What is Checked Out

- Run a custom report in ILLiad (Customer Notified via E-mail)
- Create a report in Alma Analytics

Barcode	Call Number	Due Date	Due DateTime	Loan Status	Original Due Date	Title	Location Name
254876		1/2/2019	17:00:00	Active		The Ottoman scramble for Africa : empire and diplomacy in the Sahara and the Hijaz /	ILL (Borrowing)
255888		1/2/2019	17:00:00	Active		Ecstasy unlimited : on sex, capital, gender, and aesthetics /	ILL (Borrowing)
256067		3/14/2019	23:59:59	Active		Educational theory : philosophical and political perspectives /	ILL (Borrowing)
256413		3/4/2019	23:59:00	Active		Miles Davis play-along	ILL (Borrowing)
256834		2/5/2019	23:59:00	Active		African art and the colonial encounter : inventing a global commodity /	ILL (Borrowing)
257424		5/6/2019	23:59:00	Active		Good governance gone bad : how Nordic adaptability leads to excess /	ILL (Borrowing)
258012		1/24/2019	23:59:00	Active		Rethinking European Jewish history /	ILL (Borrowing)
258040		2/25/2019	23:59:00	Active		The Literature of Place	ILL (Borrowing)
258126		3/7/2019	23:59:00	Active		Concentrationary cinema : aesthetics as political resistance in Alain Resnais's Night and fog (1955) /	ILL (Borrowing)
258347		2/23/2019	22:00:00	Active		Rainbow theology : bridging race, sexuality, and spirit /	ILL (Borrowing)
258496		3/1/2019	22:00:00	Active		Rocking mirror daybreak : for violin duo /	ILL (Borrowing)
258668		3/1/2019	22:00:00	Active		Manuscripts, memory and history : classical Tamil literature in colonial India /	ILL (Borrowing)
258780		3/26/2019	23:59:00	Active		Denial : the unspeakable truth /	ILL (Borrowing)
258803		3/18/2019	23:59:00	Active		God and the universe in the Vedaṅtic theology of Rāṁānuja : a study in his use of the self-body analogy /	ILL (Borrowing)

Primo vs ILLiad Due Dates

- Consider “commenting out” the due dates in ILLiad by commenting out that information, and add a link to Primo.




ILLiad Notices

Subscribe to Alerts Feed

No Alerts

Electronically Received Articles

Transaction	View	Size	Title	Author	Expires	Delete
-------------	------	------	-------	--------	---------	--------

Log into your Library Account here to see due dates. 

To check the status (including shipping information), click on the Transaction Number.

Outstanding Requests

Transaction	Type	Title	Author	Status
No Requests				

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```
<!--tr>
  <h4>Click on the Transaction Number to Renew, or <i>Request Again</i> if not renewable.</h4>
  <div class="default-table">
    <#TABLE name="ViewRenewCheckedOutItems" headerText="Checked Out Items"
noDataAction="ShowMessageRow" noDataMessage="No Items">
    <#TABLE name="ViewCheckedOutItems" headerText="Checked Out Items"
noDataAction="ShowMessageRow" noDataMessage="No Items">
  </div>
</tr-->
  <h3 style="text-align:center">Log into your Library Account <a
href="https://ithaca-primo.hosted.exlibrisgroup.com/primo-explore/account?vid=01ITHACACOL_V1&secti
on=overview&lang=en_US" target="_blank">here to see due dates</a>.</h3>
```

The table is hidden, and a link to Primo is added

Once the Add-on is Active, Confirm that it is Working Properly

ILLiad will give a **system message** in the ILL request indicating if the add-on:

- Failed
- Worked
- No message = no communication with Alma

Additional information may be found by turning on the “Debug log” in ILLiad

9/12/2018 1:35 PM	NCIP Response for BorrowingAcceptItem received successfully	System	System
-------------------	---	--------	--------

Yay!

9/19/2017 2:55 PM

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?><ns1:NCIPMessage xmlns:ns1="http://www.niso.org/2008/ncip"
ns1:version="http://www.niso.org/schemas/ncip/v2_0/imp1/xsd/ncip_v2_0.xsd"><ns1:AcceptItemResponse><ns1:Problem>
<ns1:ProblemType>Temporary Processing Failure </ns1:ProblemType><ns1:ProblemDetail>AlmaAcceptItemService
failed</ns1:ProblemDetail></ns1:Problem></ns1:AcceptItemResponse></ns1:NCIPMessage>
```

9/20/2017 1:11 PM

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?><ns1:NCIPMessage xmlns:ns1="http://www.niso.org/2008/ncip"
ns1:version="http://www.niso.org/schemas/ncip/v2_0/imp1/xsd/ncip_v2_0.xsd"><ns1:AcceptItemResponse><ns1:Response
Header><ns1:FromAgencyId><ns1:AgencyId>01ITHACACOL_INST</ns1:AgencyId></ns1:FromAgencyId><ns1:ToAgencyI
d><ns1:AgencyId>01ITHACACOL_INST</ns1:AgencyId></ns1:ToAgencyId></ns1:ResponseHeader><ns1:Problem><ns1:
ProblemType>Unknown User</ns1:ProblemType><ns1:ProblemDetail>failed to get user by identifier: bhogben and institution:
4016</ns1:ProblemDetail><ns1:ProblemElement>//AcceptItem/UserId/UserIdentifierValue</ns1:ProblemElement><ns1:Proble
mValue>bhogben</ns1:ProblemValue></ns1:Problem></ns1:AcceptItemResponse></ns1:NCIPMessage>
```



Some Things to Check if...



< Resource Sharing Partner

ILLiad

Partner Code: illiad Profile Type: NCIP

1 General Information 2 Contact Information 3 Parameters 4 Notes

GENERAL INFORMATION

User identifier type *

Institution ID



URL template

Enable service for guest user

Yes No

The patron match point is critical

local user = GetFieldValue("Transaction", "SSN")

A Notice by Any Other Name



On Hold Shelf Letter

Hello Bernard:

The following item, which you requested on 05/04/2018, can be picked up at IC Library - Circulation Desk Circulation Desk.

The item will be held for you until 05/25/2018.

Career **coaching** : an insider's guide

By: Bench, Marcia

Notes that may affect loan:

Sincerely

Circulation Department

<- Alma Notice

ILLiad Notice->

Dear Bernard

An item that you have borrowed:

Title: The church of Mary Magdalene : the sacred feminine and the treasure of Rennes-le-Château /

Author: Markale, Jean.

TN: 239371

is due 10/24/2017.

If you need to use the item past the due date, one renewal may be requested, if allowed by the lending Library, through your interlibrary loan account at: <https://ilene.ithaca.edu/illiad/login.html>

Interlibrary loan overdue fines are \$5.00/day for students.

If you have an questions about your interlibrary loan item, or need help renewing, please contact Interlibrary loan at: borrowing@ithaca.edu or (607) 274-3891.

You may also contact us Monday - Friday 8:30 am - 4:30 pm using Skype for Business. Username = borrowing

Thank you,

Interlibrary Loan

Turning Off ILLiad Notices

BorrowingOverdueNoticesActive

Settings

Key Value

Yes No

Description

Enables or disables the processing of borrowing overdue notification e-mails via System Manager.

And now, over to Tim

Borrowing: Unfilled Resource Sharing Requests

- SUNY is currently using OCLC to send resource sharing requests between campuses
- If a request goes unfilled within SUNY, it is very easy to send that request to non-SUNY libraries via OCLC
- Sending resource sharing requests to non-SUNY libraries is not an option in Alma

Borrowing: Unfilled Resource Sharing Requests

- If a Resource Sharing request goes unfilled by the Network Zone, Alma can send a “cannot fill” notice to the patron
- The patron could then manually submit a borrowing request via ILLiad

Or:

- Alma can send that “cannot fill” notice to an internal email account
- ILLiad’s email import feature can then automatically convert that notice into a borrowing request, which can then be processed by ILL staff like any other borrowing request

Borrowing: Unfilled Resource Sharing Requests

1. Request sent to Newtork Zone

11 [Magical mystery tour /](#)

Book (Distributed by Sonart Music Vision [2001])

OCLC Number: 223799933

MMS ID: 9930375300204808

External identifier: 01SUNYALB0000026

Internal Identifier: 999268100004808

Request Status: Request sent to partner

Partner: University at Buffalo

Requested Media: Any

Requester: Jackson, Timothy K 

Pickup At: University Library

Requested Format: Physical

Creation Date: 02/09/2019

Update Date: 02/09/2019

[Edit](#)

[View Local Resources](#)



[Other details](#)

Borrowing: Unfilled Resource Sharing Requests

2. Request unfilled by Network Zone & sent to ILLiad Resource Sharing Partner

11 [Magical mystery tour /](#)

Book (Distributed by Sonart Music Vision [2001])

OCLC Number: 223799933

MMS ID: 9930375300204808

External identifier: 01SUNYALB0000026

Internal Identifier: 999268100004808

Request Status: Request sent to partner

Partner: ILLiad Requests

Requested Media: Any

Requester: Jackson, Timothy K 

Pickup At: University Library

Requested Format: Physical

Creation Date: 02/09/2019

Update Date: 02/09/2019

[Request with active notes](#)

[View](#)

[View Local Resources](#)

...

[Other details](#)

Borrowing: Unfilled Resource Sharing Requests

3. ILLiad Resource Sharing Partner sends “cannot fill” email

Request Id:01SUNYALB0000026 [Trash x](#)



circulation@albany.edu via [exlibrisgroup.com](#)

to me ▾

RequestType: Loan

External ID: 01SUNYALB0000026

Institution: University at Albany

Title: Magical mystery tour /

OCLC Number: 223799933

Place of Publication: [Place of publication not identified] ;

Publisher: Distributed by Sonart Music Vision

Publication Date: [2001]

Call Number: PN1995.9.M86

Note: Copyright held by RBC Entertainment.

Specific Edition Only: true

Requester: TJ0807

Requested Format: PHYSICAL

Requested Media: Any

Allow Other Format: false

Requested Pickup location: University Library

For Reading-Room Use Only: false

Willing to Pay: false

Needs Patron Information: false

Borrowing: Unfilled Resource Sharing Requests

4. ILLiad email import feature converts email into borrowing request

Detail	OCLC	History	Z39.50	PubMed/Dodline	
General Request Information					
Transaction Number	960300	Transaction Date	2/9/2019 1:15 PM		
Username	TJ0807	Service Level	Regular		
Name	Timothy K. Jackson				
Status	Faculty/Staff	Department	University Libraries		
Delivery Location	ILL	E-mail	tjackson@albany.edu		
Recommended for Purchase?		Format Preference			
		<input checked="" type="checkbox"/> Accept Alternate Edition		OCLC Information	
		<input type="checkbox"/> Accept Non English		ILL Number	
		<input type="checkbox"/> Allow Renewals?		OCLC Number	223799933
		<input type="checkbox"/> Library Use Only?		Lending String	
		<input type="radio"/> Article <input checked="" type="radio"/> Loan		Lender	
		Document Type		System ID	OCLC
		PHYSICAL		OCLC Status	
Article Info Loan Info Citation Information Imported Request					
Title	Magical mystery tour /				
Author					
Publisher	Distributed by Sonart Music Vision				
Place	[Place of publication not iden				
Date	[2001]				
Edition					
Original Loan Author					
Original Loan Title					
Item Information					
Call Number					
Location					
Format					
Availability					
Barcode					
Due Date					
ISxN					
Reason For Cancellation					
Special Instructions					
Max Cost/Pieces					

Borrowing: Unfilled Resource Sharing Requests

5. Awaiting User Verification (if necessary)

Detail	OCLC	History	Z39.50	PubMed/Dodine
General Request Information				
Transaction Number	961685	Transaction Date	2/17/2019 12:10 PM	
Username	Unmatched	Service Level	Regular	
Name	Unmatched User			
Status	Faculty/Staff	Department	Other	
Delivery Location	ILL	E-mail		
Recommended for Purchase?		Format Preference		
<input checked="" type="checkbox"/> Accept Alternate Edition		<input type="checkbox"/> Accept Non English		
<input type="checkbox"/> Allow Renewals?		<input type="checkbox"/> Library Use Only?		
<input type="radio"/> Article		<input checked="" type="radio"/> Loan		
Document Type	PHYSICAL			
OCLC Information				
ILL Number				
OCLC Number	223799933			
Lending String				
Lender	...			
System ID	OCLC			
OCLC Status				
Article Info Loan Info Citation Information Imported Request				
Title	Magical mystery tour /			
Author				
Publisher	Distributed by Sonart Music Vision			
Place	[Place of publication not iden]			
Date	[2001]			
Edition				
Original Loan Author				
Original Loan Title				
Item Information				
Call Number				
Location				
Format				
Availability				
Barcode				
Due Date				
ISxN				
Reason For Cancellation				
Special Instructions				
Max Cost/Pieces				
Copyright	Date	Note	Type	Added By
Compliance/Pay Meth.	2/17/2019 12:10 PM	Imported from email with unknown username: TJ0808	System	System

Primo “My Library Card”

The screenshot displays the 'Loans' section of a Primo library account. The interface includes a navigation bar with tabs for OVERVIEW, LOANS, REQUESTS, FINE + FEES, BLOCKS + MESSAGES, and PERSONAL DETAILS. The 'LOANS' tab is active. On the left, there are links for 'University at Albany' and 'University at Buffalo'. The main content area shows a list of 7 loans, each with a numbered box, title, author, due date, pickup location, and a 'RENEW' button. A 'Sort by' dropdown and a 'RENEW ALL' button are also visible at the top of the list.

Item #	Title	Author	Due Date	Pickup Location	Action
1	The death and life of the Gr...	Egan, Dan,	Due: 05/01/2019, 23:00.	Pick up:Science Library SCI Books ...	RENEW
2	The things they carried : a ...	O'Brien, Tim,	Due: 04/30/2019, 23:59.	Pick up:University Library ULIB Bo...	RENEW
3	The white album /	Didion, Joan,	Due: 04/30/2019, 23:59.	Pick up:University Library ULIB Bo...	RENEW
4	As time goes by /	Taylor, Derek,	Due: 04/30/2019, 23:59.	Pick up:University Library ULIB Bo...	RENEW
5	The Adirondacks journey /	Jenks, Edna.	Due: 03/24/2019, 23:59.	Pick up:University Library Borrowing	
6	A Hard Day's Night	The Beatles	Due: 03/01/2019, 20:00.	Pick up:University Library Borrowing	
7	London Calling	The Clash	Due: 02/20/2019, 23:59.	Pick up:University Library Borrowing	

Configuring ILLiad Alma Integration

Borrowing & Lending vs. Lending Only

- Borrowing integration requires that users have the same ILLiad & Alma usernames
- Libraries can opt for lending only if ILLiad & Alma username matching is an issue

Requirements:

- Access to ILLiad Customization Manager
- Permission to save files to C:\Program Files (x86)\ILLiad\Addons
- Alma Roles:
 - General System Administrator
 - Resource Sharing Partners Manager
 - Fulfillment Services Manager

Configuring ILLiad Alma Integration

Borrowing & Lending:

1. Install the Alma NCIP Client Addon
2. Create an ILLiad Resource Sharing Partner
3. Create a Rota Template
4. Create a Rota Assignment Rule
5. Create a Send Borrowing Request Rule
6. Configure the ILLiad Email Import Feature
7. Configure Allowed Email

Lending Only:

1. Install the Alma NCIP Lending Only Addon
2. Create an ILLiad Resource Sharing Partner

Installing the Alma NCIP Client Addon

Documentation: <https://slcny.libanswers.com/faq/260720>

1. Download addon from SLC FAQ page
2. Save addon to C:\Program Files (x86)\ILLiad\Addons
3. Configure addon in ILLiad client
4. Restart ILLiad client

Things to keep in mind:

- This is a client addon, so it must be installed at each PC where ILL requests are processed
- **Multiple version of these addons exist, so be sure to use the versions available from the SLC FAQ website**

Installing the Alma NCIP Client Addon

Borrowing & Lending addon settings:

Name	ALMA_NCIP_Client
Author	Tom McNulty, VCU Libraries
Version	2.0
Active	<input checked="" type="radio"/> Yes <input type="radio"/> No
Description	This system level addon allows for ILLiad to communicate with Alma via NCIP protocol.

Setting Name	Value	Type
NCIP_Responder_URL	https://suny-alb.alma.exlibrisgroup.com/view/NCIPServlet	string
acceptItem_from_uniqueAgency_value	01SUNY_ALB	string
ApplicationProfileType	ILL	string
BorrowingAcceptItemFailQueue	NCIP Error: BorrowingAcceptItem Failed	string
BorrowingCheckInItemFailQueue	NCIP Error: BorrowingCheckInItem Failed	string
LendingCheckOutItemFailQueue	NCIP Error: LendingCheckOutItem Failed	string
LendingCheckInItemFailQueue	NCIP Error: LendingCheckInItem Failed	string
EnablePatronBorrowingReturns	<input checked="" type="checkbox"/>	boolean
Use_Prefixes	<input type="checkbox"/>	boolean
Prefix_for_LibraryUseOnly	LU-	string
Prefix_for_RenewablesAllowed	TN-	string
Prefix_for_LibraryUseOnly_and_RenewablesAllowed	LU-	string

Installing the Alma NCIP Client Addon

Lending Only addon settings:

Name	ALMA_NCIP_Lending_Client
Author	Kurt Munson Northwestern University
Version	1.0
Active	<input checked="" type="radio"/> Yes <input type="radio"/> No
Description	This system level addon allows for ILLiad to communicate with Alma

Setting Name	Value	Type
NCIP_Responder_URL	https://suny-alb.alma.exlibrisgroup.com/view/NCIPServlet	string
acceptItem_from_uniqueAgency_value	01SUNY_ALB	string
ApplicationProfileType	ILL	string
LendingCheckOutItemFailQueue	NCIP Error: LendingCheckOutItem Failed	string
LendingCheckInItemFailQueue	NCIP Error: LendingCheckInItem Failed	string

Creating an Alma Resource Sharing Partner

- An NCIP Resource Sharing Partner is needed to receive NCIP messages from ILLiad and send emails to ILLiad

Documentation: <https://slcny.libanswers.com/faq/260794>

1. Navigate to Fulfillment | Resource Sharing | Partners and click the Add Partner button
2. Enter required information in General Information tab
3. Enter required information in Parameters tab

Creating an Alma Resource Sharing Partner

General Information:

< Resource Sharing Partner

Cancel

Save

ILLiad Requests

Partner Code: ILL Profile Type NCIP System Type ILLiad

General Information

Contact Information

Parameters

Notes

Code * ILL

Profile Type * NCIP

System Type * ILLiad

Average Supply Time 5

Currency

Supports Borrowing

Supports Lending

Locate Profile

Default Partner

Name * ILLiad Requests

Status Active

Delivery Delay (days) 0

Borrowing Workflow Borrowing

Lending Workflow Lending

Creating an Alma Resource Sharing Partner

Parameters:

General Information

Contact Information

Parameters

Notes

GENERAL INFORMATION

User identifier type *

URL template

Enable service for guest user Yes No

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

Loan period

[Download Certificate](#)

Request pushing method * Open URL Link

Broker System NCIP URL

Default library owner *

Creating an Alma Resource Sharing Partner

Parameters (continued):

REQUEST ITEM

Bibliographic record ID type * **OCLC Number** ▼

Support Borrowing

CHECK-OUT ITEM

Default location * **Lending** ▼

Default item policy * **RS Long Loan** ▼

ACCEPT ITEM

Default location * **Borrowing** ▼

Default pickup library **University Library** ▼

Automatic receive

Receive Desk * **Default Circulation Desk** ▼

LOOK UP USER

Require Authentication Yes No

EXPORT TO THIRD PARTY

Export to third party Yes No

Export email address * **ualbany.illdept@gmail.com**

Close request when exported

CREATE USER FISCAL TRANSACTION

Create fee using * **Ignore message** ▼

Creating a Rota Template

- A Rota is Alma's equivalent to a Custom Holdings Group
- We're essentially creating a Custom Holdings Group for the ILLiad Resource Sharing Partner

Documentation: <https://slcnyc.libanswers.com/faq/260795>

1. Navigate to Fulfillment | Resource Sharing | Rota Templates and click the Add Template button
2. Enter required information in General Information tab
3. Select the ILLiad Resource Sharing Partner in the Template Members tab

Creating a Rota Template

General Information:

ILLiad ▼

Name	ILLiad	Type	NON_ORDERED	Status	ACTIVE
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General Information | **Template Members** | Notes

Code * Name *



Type Status


Template Members:

ILLiad ▼

Name	ILLiad	Type	NON_ORDERED	Status	ACTIVE
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General Information | **Template Members** | Notes

[+ Add Partners](#) ▼  

	↕ Name	↕ Code	↕ Profile Type	Status	
1	ILLiad Requests	ILL	NCIP	Active	

Creating a Rota Assignment Rule

- Rota assignment rules allow us to arrange Rotas into Alma's equivalent to Custom Holdings Paths
- This Rota assignment rule is need to assign resource sharing requests not filled by the Network Zone Rota to the ILLiad Rota

Documentation: <https://slcny.libanswers.com/faq/260796>

1. Navigate to Configuration Menu | Fulfillment | Resource Sharing | Rota Assignment and click the Add Rule button under Institution Rules List
2. Give the Rota Assignment Rule a Name
3. Add Input and Output Parameters

Creating a Rota Assignment Rule



Input and Output Parameters:

Rota Assignment Rules ▼

Name	ILLiad Fallback		
Description	-		
Created By	Jackson, Timothy K	Created On	11/30/2018
Updated By	Jackson, Timothy K	Updated On	11/30/2018

Input Parameters ▼

Name	Operator	Value
1 Requested Format	Is Not Empty	-

Output Parameters ▼

Rota Templates	ILLiad
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Creating a Send Borrowing Request Rule

- Needed to actually transmit the request to a partner in the assigned Rota

Documentation: <https://slcny.libanswers.com/faq/260797>

1. Navigate to Configuration Menu | Fulfillment | Resource Sharing | Sending Borrowing Request Rules and click the Add Rule button under Institution Rules List
2. Give the Send Borrowing Request Rule a name
3. Add Input and Output Parameters

Creating a Send Borrowing Request Rule



Input and Output parameters:

Sending Borrowing Request Rules ▼

Name	ILLiad Request		
Description	-		
Created By	Jackson, Timothy K	Created On	11/30/2018
Updated By	Jackson, Timothy K	Updated On	01/15/2019

Input Parameters ▼

Name	Operator	Value
1 Partner	=	ILLiad Requests

Output Parameters ▼

Send Request	True
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Configuring the ILLiad Email Import Feature

Documentation: <https://slcny.libanswers.com/faq/260788>

1. Create email account to be used by email import feature
2. Create required customization keys in ILLiad Customization Manager
3. Configure Email Import mapping table
4. Set EMailImportActive key to Yes
5. **Restart ILLiad System Manager**

Things to keep in mind:

- The email import feature will convert every email in inbox into an ILLiad request, so do not use this email account for other purposes

Configuring the ILLiad Email Import Feature

Customization keys:

EEmailImport1ArtideStatus	Awaiting Copyright Clearance
EEmailImport1LoanStatus	Awaiting Request Processing
EEmailImport1LoanTag	RequestType:
EEmailImport1Password	S[REDACTED]!
EEmailImport1PopHost	pop.gmail.com
EEmailImport1PopPort	995
EEmailImport1SSEnabled	Yes
EEmailImport1UserID	ualbany.illdept@gmail.com

Configuring the ILLiad Email Import Feature

Mapping table:

Id	E-MailNumber	NVTGC	E-MailImportName	ProcessType	TableName	FieldName	TagValue
9	1	ILL	Alma	Borrowing	Transactions	LoanAuthor	Author:
10	1	ILL	Alma	Borrowing	Transactions	LoanTitle	Title:
11	1	ILL	Alma	Borrowing	Transactions	ESPNNumber	OCLC Number:
12	1	ILL	Alma	Borrowing	Transactions	LoanPlace	Place of Publication:
13	1	ILL	Alma	Borrowing	Transactions	LoanPublisher	Publisher:
14	1	ILL	Alma	Borrowing	Transactions	LoanDate	Publication Date:
15	1	ILL	Alma	Borrowing	Transactions	Username	Requester:
16	1	ILL	Alma	Borrowing	Transactions	DocumentType	Requested Format:

Configuring an Allowed Email

Documentation: <https://slcny.libanswers.com/faq/260790>

1. Add email account to be used by ILLiad email import feature to list of allowed emails in Alma

	Enabled	Email / Email Domain	Include list description
1	<input checked="" type="checkbox"/>	<input type="text" value="exlibrisgroup.com"/>	<input type="text" value="include only exlibris e-mails"/>
2	<input checked="" type="checkbox"/>	<input type="text" value="circulation@albany.edu"/>	<input type="text" value="ULIB Circ"/>
3	<input checked="" type="checkbox"/>	<input type="text" value="ualbany.illdept@gmail.com"/>	<input type="text" value="Resource Sharing Alma/Illiad testing"/>
4	<input checked="" type="checkbox"/>	<input type="text" value="tjackson@albany.edu"/>	<input type="text" value="Tim Jackson"/>

Things we're still working on

- Borrowing Renewals
- Multi-volume check-out on both Borrowing & Lending Side

Questions?