ILLiad/Alma NCIP Lending Only Addon

History, Functionality, Configuration, Use

**History:**

This ILLiad System Addon is based upon the NCIP Addon Bill Jones at the IDS Project created for Harvard to link ILLiad and Aleph together. Tom McNulty of VCU worked with Moshe Shechter at Ex Libris and Shawn Styer at Atlas Systems to modify it to work with Alma. Chen Mackfeld at ExLibris worked with Kurt Munson at Northwestern to configure it after the June 2015 Alma release. This version of the addon also handles longer barcodes than the Harvard and VCU versions. It does Lending only.

**Functionality:**

The Addon sends two NCIP messages from ILLiad to Alma. It handles moving outgoing lending requests to the Resource Sharing Fulfillment Unit associated with a Library (Main, Law or Medical in our case) rather than the default Alma Resource Sharing Library. Returned lending items are restored to their permanent location.

Notes are written into every transaction showing successful responses: “NCIP Response for [Process] received successfully” or when there is an NCIP error the Note contains the NCIP response. The ILLiad Client Log files will contain any errors with the processing of request via NCIP. Thus functionality can be confirmed this way.

Lending

When Updating Stacks Searching, clicking the Mark Found button causes the Addon to send a Lending Check Out Item NCIP message to Alma and the item will be moved to the Resource Sharing Fulfillment Unit location of Lending associated with that Library. NOTE: NCIP functions by barcode only so you will need to scan in and store the item barcode in an ILLiad field within that transaction. This version of the Addon is designed to use the ItemInfo3 field from ILLiad. If you wish to use a different field, you will need to edit the Addon lua code to use a different ILLiad Transaction table field name instead. When an item is successfully relocated, the Addon adds a note to the ILLiad transaction stating this. If there is an error, the ILLiad request is routed to an error queue and the NCIP error message is written to a note for that transaction.

When an item is returned, i.e., the Lending Returns function is used in ILLiad, the Addon sends an NCIP Check In Item Lending message to Alma and the item is returned to its permanent location or routed if needed. When an item is successfully relocated, the Addon adds a note to the ILLiad transaction stating this. If there is an error, the ILLiad request is routed to an error queue and the NCIP error message is written to a note for that transaction.

**System Configuration:**

ILLiad Configuration

This is a system addon, thus it must be installed and configured on every machine that will communicate with Alma via NCIP. Information on installing and managing Addons is here: <https://prometheus.atlas-sys.com/display/ILLiadAddons/Installing+Addons> System Addons are handled and configured like Client Addons, not Server Addons.

Likewise, you will need to edit the Client layout to expose the Item Info Three field in Lending so you can add the barcode there. Information on configuring the client is found here: <https://prometheus.atlas-sys.com/display/illiad/Customizing+the+Client+Layout> This will need to be done on every machine that processes outgoing Lending loans.

You will need the ALMA\_NCIP\_lending.lua file and the Config.xml files in a folder named ALMA-NCIP-Lending within your Addons folder where ILLiad is installed on your machine.

The following fields will need to be filled out for the Addon to work. These are configured in the ILLiad client under system.

**NCIP\_Responder\_URL** is your Alma server with /view/NCIPServlet appended to the URL. For example: na02.alma.exlibrisgroup.com/view/NCIPServlet

**acceptItem\_from\_uniqueAgency\_value** is your Institutional Code in Alma. For example 007Bond\_INST

**ApplicationProfileType** is the code for the Resource Sharing Partner you have configured in Alma. For examples, ILLiad

**LendingCheckOutItemFailQueue** This is the name of the queue where items that were not moved to the Resource Sharing Fulfillment Unit’s location are placed.

**LendingCheckInItemFailQueue** This queue is where returned lending items that could not be moved from the Resource Sharing Fulfillment Unit’s location go.

**Alma Configuration:**

Configuration in Alma is a three part process. First, an Organization Unit Name level library is defined as being a Resource Sharing Library one by checking the check box under Resource Sharing Information. Second, a Fulfillment Unit associated with that library is configured for use by resource sharing requests with at least a Fulfillment Unit Location for lending requests. Only the default loan rule is applied. Third, Resource Sharing Partners are defined under Resource Sharing.

1. Configure the library. Under General Configuration, choose configuration. Under General, choose Libraries and select Add a Library or Edit Library Information. Choose the tab for libraries, select the library you wish to edit. Under Resource Sharing Information, check the Is Resource Sharing Library box. Under Lending Set up, choose a Default Location of Lending Resource Sharing Requests.
2. Configure the Fulfillment unit. Under Fulfillment Configuration, choose the Configuration menu and select the library you wish to configure the Fulfillment Unit for by choosing that library from the “You are Configuring” dropdown menu. Under the Physical Fulfillment area, click Fulfillment Units. Click the Add Fulfillment Unit button. Name the unit, assign it a code, and set the On Shelf Request Policy to “No Requesting from available holding”. Open the Unit and click on the Fulfillment Unit Locations tab. Add a borrowing and a lending location each and make their Location type “Open”. Under the Fulfillment Unit Rules tab, choose Rule Type of “loan” and apply the Default Loan rule
3. Configure the partner. Under Resource Sharing in Alma, choose Partners.

Choose Add Partner,

Under General Information, you will need to add:

1. A code name,
2. A name for the service
3. Choose ILLiad from the dropdown menu for System Type,
4. Check the Supports Lending checkbox to use NCIP for Lending.
5. Change the Status to Active.

NOTE: No other configuration is needed on this page.

Click the Parameters Tab

Under Request Item:

1. Choose OCLC Number from the dropdown for Bibliographic record ID type

Under Check-Out Item:

1. Set the Default Location to Lending Resource Sharing Requests
2. Set the Default item Policy to Normal (not Listed)

**Use:**

The Addon is a system one so it runs in the background when items are checked in from the lending library or updated to returned on the Borrowing side. Thus, the steps in ILLiad processing are identical to situations where the Addon is not installed save adding the item barcode into a fillable lending request before marking it found. Only where there is an NCIP error does processing change. If a label does not print or a return slip does not print, check the transaction number to see if there was an NCIP error and the transaction was placed in the error queue.

On the Lending side when items are updated to shipped, scan the item Barcode into the Item Info 3 field and click the Mark Found button to move the item to the Lending Resource Sharing Location in Alma. On return, just do lending returns as normal. If an item goes into the error queue in ILLiad upon Lending return, just discharge it in Alma and manually update the record in ILLiad by moving it to the Request Finished queue.

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