Configuring and testing Tipasa for Alma

Product: Alma

Question

Is there a *checklist* when configuring Tipasa or WorldShare ILL in Alma? Here is our experience in Support.

Answer

Here is a high-level outline of the steps:

1. **Roles** - to see "Borrowing Requests" and "Lending Requests" in Alma, one of the following user roles must be added and scoped to the Resource Sharing Library for your institution:

   Fulfillment Services Operator (in the scope of a Resource Sharing library)
   Fulfillment Services Manager (in the scope of a Resource Sharing library)

   - Some Institutions found it helpful to have the Scope of the Institution for any of the above.

2. Add a "**Partner**" in Alma, from: Alma > Fulfillment > Resource Sharing > Partners. Call it, e.g., Tipasa.

   Code: 2.00 (*Might not be needed anymore)*
   Profile Type: NCIP

   You will need to enrich it from the configuration as follows in the drop-down menus.

   - ***Important note:*** *In the Partner > CHECK-OUT ITEM, make sure that the default location listed is the "Lending Resource Sharing Requests" (this is the out-of-the-box configuration); if you modified it, make sure it refers to the Resource Sharing Fulfillment Unit. The same logic applies to the Borrowing configuration.*
   - Depending on the type of integration that was determined with OCLC, you will need the **API key, Server, and Requesting Agency ID**.
   - To configure the "Partners" and "Rota Templates", have the Role of "Resource Sharing Partners Manager" (Institution Scope). Sign out and back in if you do not see these menus in Alma > Fulfillment.

3. Configure:
   1. Alma > Fulfillment > Resource Sharing > **Rota Template**. Click to “Add Template”, with any code, any name (e.g. Tipasa), non ordered, and in the “Members” tab, add Tipasa.
   2. Configuration > Fulfillment > Resource Sharing > **Locate Profiles**, add one with your Partner code (Tipasa), and Type = No Locate.
   3. Configuration > Fulfillment > Resource Sharing > **Rota Assignment Rules** > Add a Rule, no need for a condition when only Tipasa is used.
   4. Configuration > Fulfillment > Resource Sharing > **Sending Borrowing Request Rules** > Add a Rule for the Partner, which is “true”.
   5. Configuration > Fulfillment > Resource Sharing > **Workflow Profiles** - add one for Borrowing, and one for Lending. One customer has these selected for Borrowing: *Automatic renew,Cancelled by partner,Cancelled By Patron,Cancelled by staff,Declared lost by partner,Lender check in,Manual renew,Renew requested,Request*

accepted,Waiting for cancel response,Waiting for receive digitally

4. Go back to the **Partner** configuration in step 2 and add Locate Profile, and, Workflow Profiles.
5. Remember to enable the **BlankILL form**: Configuration > Discovery > Configure Views, and within each view - on the tab for Links and enable BlankILL.
    - If BlankILL for does not show up: Add another Partner, type ISO, as a dummy.
    - Also make sure that the user has Patron Role with the Scope of the *Institution*. If you have Patron Roles with the Scope of the Library, remember to add a Scope for the RS (Resource Sharing) library.

Review these elements:

1. "**General Electronic Services**", from: Configuration > Fulfillment > Discovery Interface Display Logic. For example: Hide Resource Sharing Request with Availability by the institution = true

2. "**Resource Sharing Request**" form, in: Configuration > Discovery > Getit Configuration.

3. "**Temporary Item Creation Rules**" on the Library level (your RS library), of: Configuration > Fulfillment > Library Management.

4. In Primo, the item will show up with the status "*On ILL process until {0}*". Some libraries changed to: "*On Interlibrary Loan until {0}*". The text can be modified in: Configuration > Discovery > Display Configuration > Labels > ViewIt Labels> *c.uresolver.getit2.item_list.status.ILL.with_expected_date*, part of: *ViewIt Labels*.

5. Inspect as well - Patron Limits, Overdue and Lost Loan Profiles.

This advice was shared by one of the libraries:

" Tipasa requires the operator to enter the book's barcode. When I checked out a book to another library through Tipasa, with the systems linked, for the first item, a message popped up when I was saving the checkout, and it said that I will need to enter the item's barcode to link the checkout in Tipasa to my circulation system.

Tipasa requires the item's barcode to link the two systems. Tipasa has a blank field to enter the barcode. That is an extra step, but it is easy to do when using the barcode scanner. Once that is done and we save the record, it is checked out in Alma, too, saving us that extra step. "

Additional Information

Click here for more about [NCIP, and Broker Based Resource Sharing](#).

More blogs can be found in the [Developers Network](#).

See this blog: https://developers.exlibrisgroup.com/blog/alma-and-tipasa-integration/

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