



# Needs of Small Libraries and Consortia

Collaboration and use cases

Consortium of Icelandic Libraries, Luxembourg *bibnet.lu*  
and LIBIS network in Belgium

# Collaboration between

- The Consortium of Icelandic libraries,
  - 300 libraries in one Aleph/Primo
- the Luxembourg *bibnet.lu* library network
  - 81 libraries using one Aleph/Primo
- and the LIBIS network in Belgium
  - 83 libraries - 27 Alma Institutions - 35 Primo Views

# Collaboration on Alma and consortia

- Functionalities for smaller libraries
  - Non-academic
  - Academic
- Operating large consortia

Resulted in a focus list for Alma development sent to Ex Libris.

# Focus list included:

- More flexibility in defining roles for staff users
- Flexibility for supporting a large consortium with high number of libraries
- Simple editor for letters and notices
- Communication with self-service machines with precise messages
- More flexibility in fulfillment configuration
- Ease of raising an inventory

# Examples of Use Cases

- Self-service options for patrons, based on usage of APIs in library system
- Patron management

# Self-service options for patrons

- Online renewal of a library card and payment
- Patrons in most libraries in Iceland pay an annual fee for their library card. Currently not possible in Primo/Aleph. **No Alma API exists.**
- Ex Libris suggested the creation of an idea, see <http://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/18463276-make-it-possible-for-patron-to-automatically-renew>

# Self-service options for patrons

- Request a **new password**
- It should be possible for patrons to request a new password when the old one is lost/forgotten.

# Self-service options for patrons

- Displaying **of library card info** in Primo
  - Number of card
  - Expiration dates

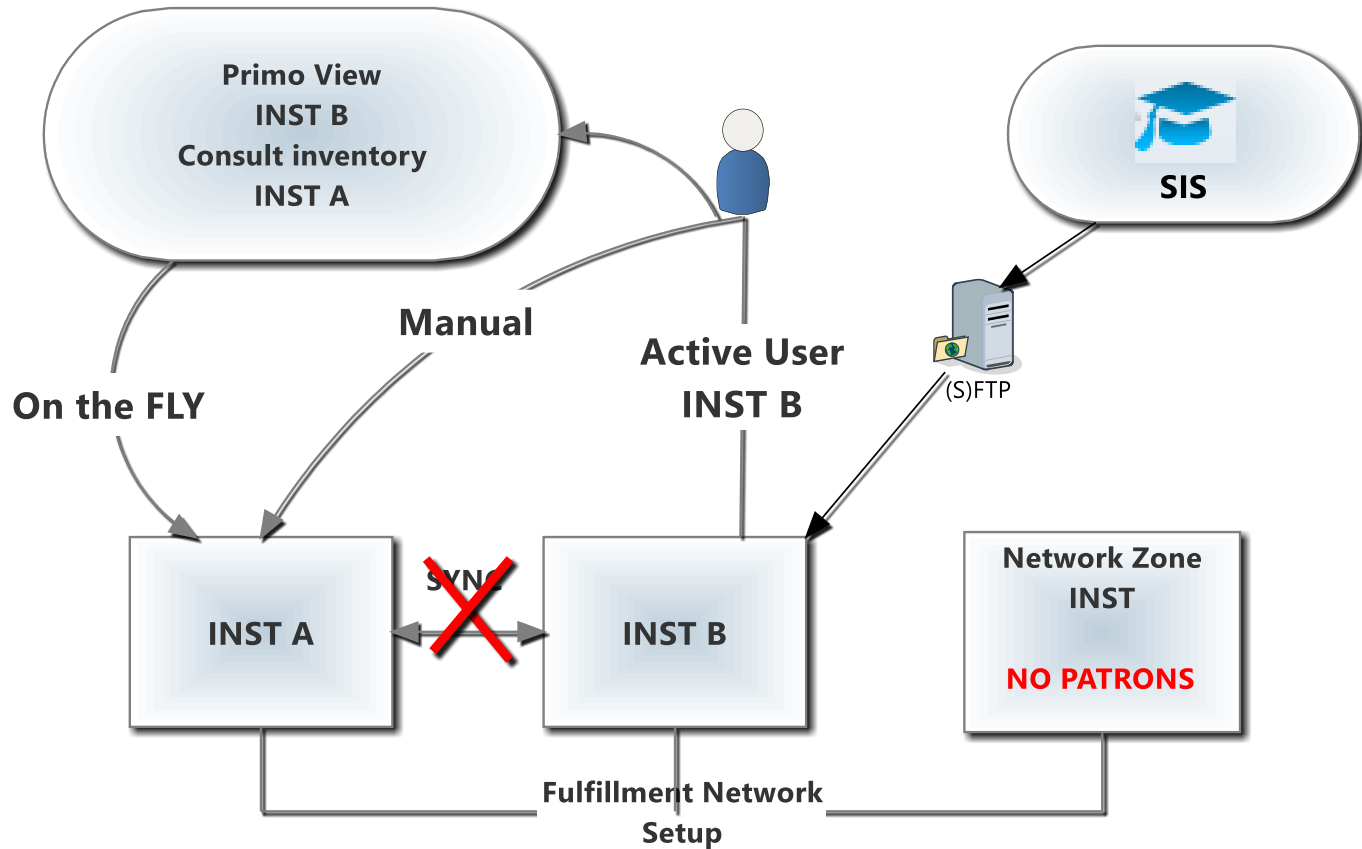
The variety of expiration dates in Aleph in a large consortium is not reflected in Primo

- Are there APIs in Alma for those things?

# “Patron management” Requirements

Context: “Struggle since 2014 for LIBISnet”

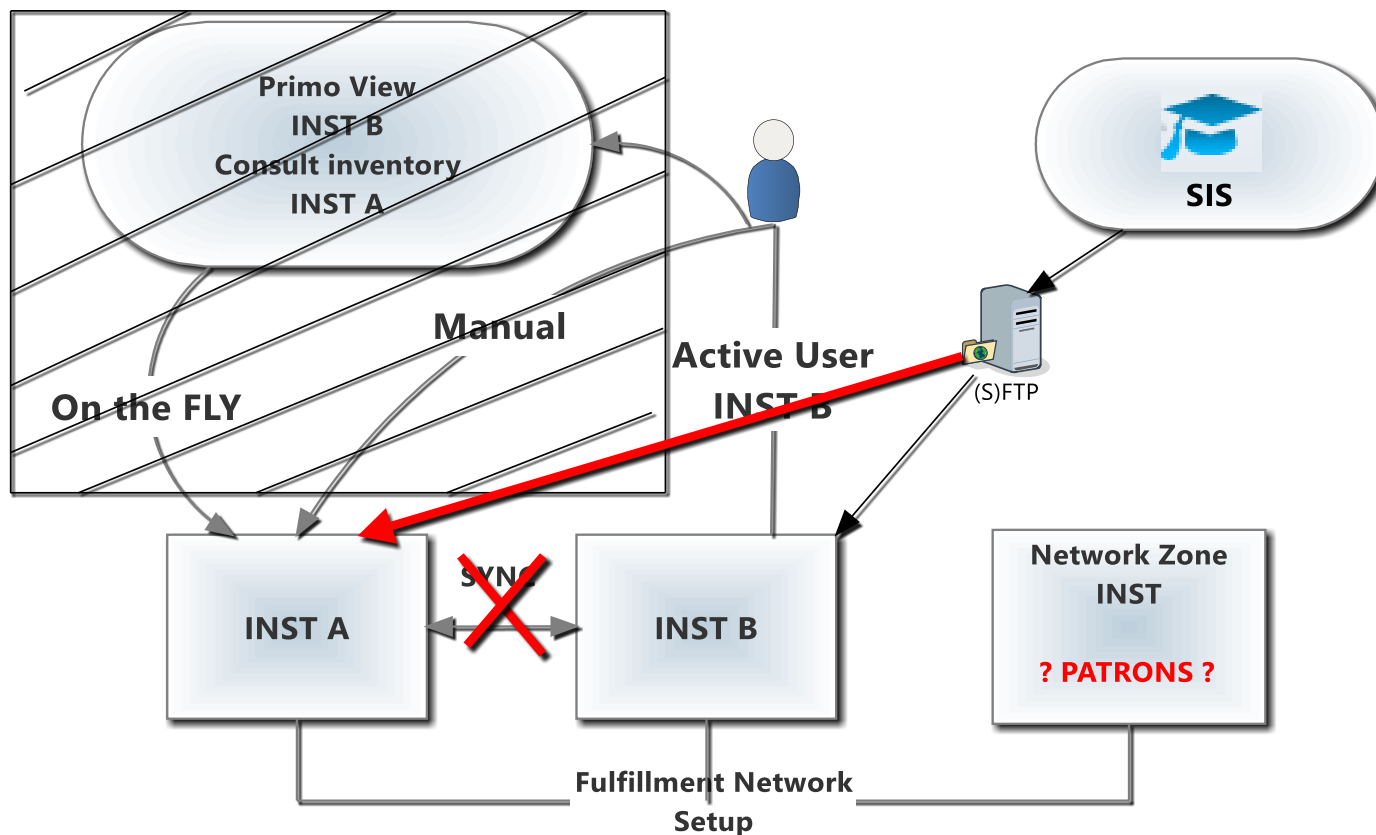
Initial setup:



# “Patron management” Requirements

Context: “since 2017 for LIBISnet”

Setup:



# “Patron management” Requirements

Context: “Use Case community libraries Flanders 2017 “ (1)

Setup: Complex situation based upon flexible collaboration

that Libraries can/should be migrated in different settings (Flexible topology):

- One Library – one Alma Institution – one community/School: smaller libraries which are not part of a collaboration within a region.
- Multiple libraries – one Alma Institution – one Community/City/School: “large” libraries with multiple sub libraries, but which are not part of a collaboration with other libraries. (E.g. OB Leuven)
- Multiple Libraries – one Alma institution – multiple communities/Schools: multiple libraries which are part of a **collaboration within a region**. (E.g. Regio Pajottenland)

# “Patron management” Requirements

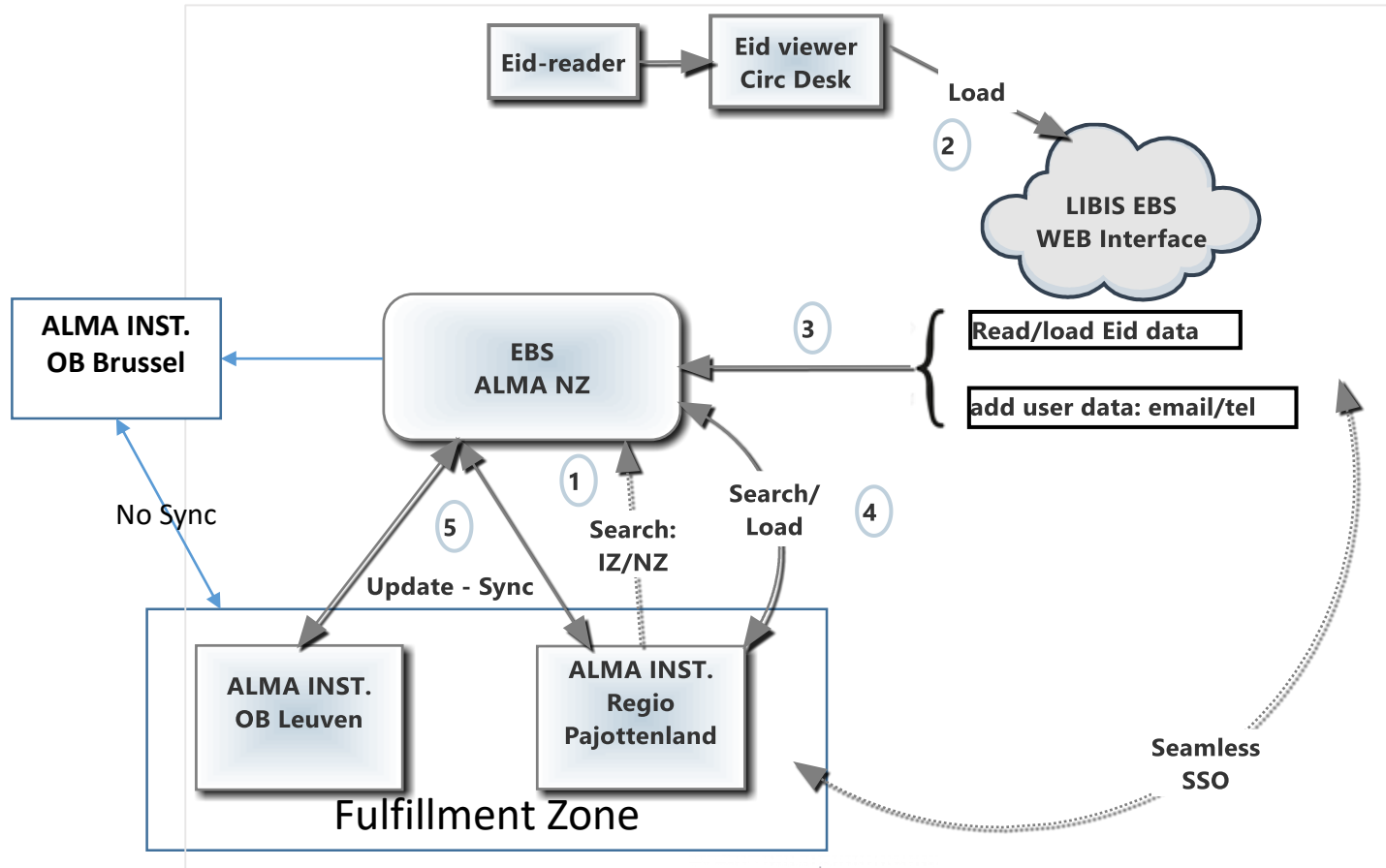
Context: “Use Case community libraries Flanders 2017 “ (2)

One Central Patron file with common data:

- The **Alma NZ** should become the environment where common user data of libraries will be stored. However Staff librarians are **not supposed to work in the NZ Alma** environment. From within their local Alma Institution they should be able to:
  - **Search** in the NZ and get/retrieve/load - use these patron records in their local Alma Environment.
  - **Update** NZ patron records from their own institution. Be aware that these changes have to be synchronized in all institutions where this patron is active.
- Be aware! a flexible setup should be possible so libraries/IZ's are able to define which data needs to be **synched** from the NZ?

# “Patron management” Requirements

Context: “Use Case community libraries Flanders 2017 “ (3)



# “Patron management” Requirements

Context: “Use Case community libraries Flanders 2017 “ (4)

- Essential: Searching from the IZ in the NZ for Patron records has to be possible.
- Essential: Update and sync mechanism(s) between IZ and NZ have to be in place in Alma.
  - a flexible setup should be possible where libraries/IZ's are able to define which data needs to be synched from the NZ per Fulfillment Network Zone?

## Questions?

Alma (ExLibris) does NOT? ... have an answer for these complex use cases at this moment?

What are “the” plans?

Are there similar Use Cases within the ExLibris community?



# Expectations

- That Ex Libris will concentrate development efforts on the needs of large and mixed consortia

# Summary

- The conversation between the three consortia was interesting and very helpful in understanding our common needs.
- Are other consortia dealing with similar issues?
- Should this work be continued within the Consortia SWIG?