Sharing resources with Alma and Primo VE

Experience of Universidad de Chile and Pontificia Universidad Católica de Chile

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Background

Universidad de Chile

Ítems: 3.032.455
Libraries: 48
Titles Electronic Collection: 200.000
Loans: 26.440
Library space: 27.702 m^2

UC de Chile

PONTIFICIA
UNIVERSIDAD
CATÓLICA
DE CHILE

Ítems: 1.511.526
Libraries: 10
Titles Electronic Collection: 490.314
Loans: 41.117
Library space: 22.878 m^2

The project

2016

Different Library Systems

University of Chile → Symphony

Pontifical Catholic University of Chile → Aleph

2017

Both Universities with ALMA

University of Chile → ALMA

Pontifical Catholic University of Chile → ALMA

2020

Different Primo Version

University of Chile → PRIMO VE

Pontifical Catholic University of Chile → PRIMO CLASSIC

2021

Both Universities with ALMA - PRIMO VE

The project

- Implement an integrated online Interlibrary Loan system
- Technological feasibility via ALMA and PRIMO VE
- Speed up the process, excluding the use of the printed ballot and the transfer times for Interlibrary Loans pick-up
- Improvements in material tracking and communications with the user and the library
- First experience in Latin America in the use of Resource Sharing services

The team

University of Chile

- Alma Administrator
- Coordinator of library services
- Coordinator team

Pontifical Catholic University of Chile

- Alma Administrator
- Coordinator of library services
- Coordinator team

Proquest

- Technical Support Team Leader

Main challenges
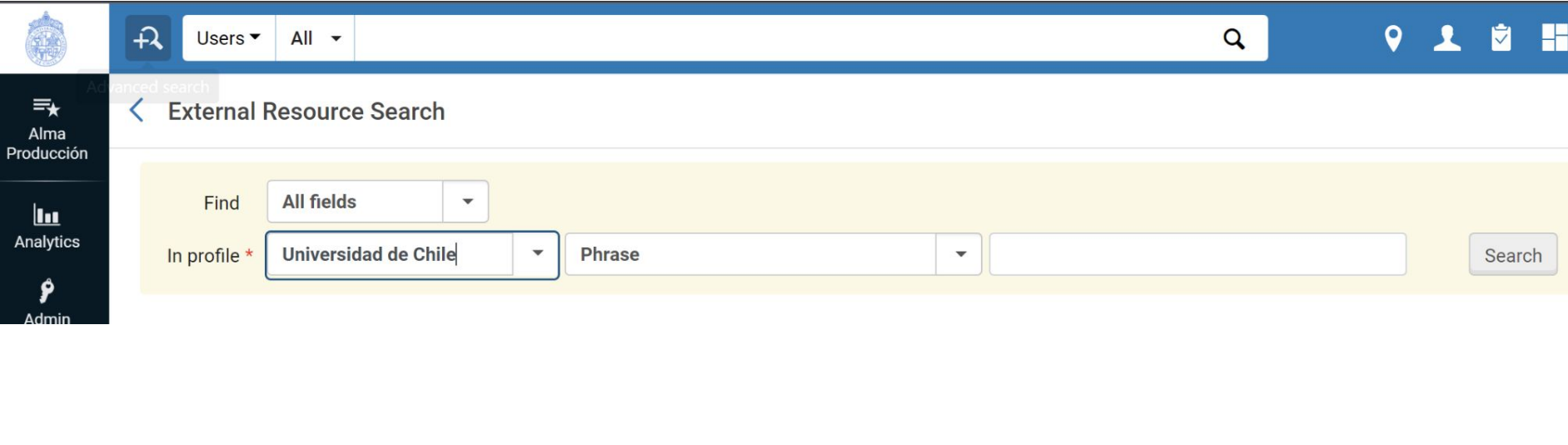
Configuration

- Decisions
  - ✓ Resources sharing libraries: One or more
  - ✓ Resources sharing model: Broker-Based, Peer-to-Peer, or Fulfillment Networks
  - ✓ Relations between libraries
  - ✓ Physical locations associated with Resource Sharing
  - ✓ Terms of Use
  - ✓ Definition of partners
  - ✓ Personal data protection

Search in external catalog, spanish version

- Search external resources was disable in the spanish version.
- The case #06304579 was opened, and the issue was solved in June 2022 release.

Translations to spanish

- Translations to spanish are no precise enough
- Case #06466772 was opened, improvements will be reflected in November 2022.

Locating requests

-   When users send a request is expected an automatic location of the resource in the partner's collection. All our borrowing requests have the status "Locate failed".
-   Cases #05329222 and #06306981 were opened, solution proposed after Julio 2023.

4 ☐ **La filosofía política de Sto. Tomás de Aquino**
Book By Galán Gutiérrez, Eustaquio. (Revista de Derecho Privado 1945)
OCLC Number: 17336956
MMS ID: 007276490202206

Internal Identifier: 8379454720003396
Request Status: Locate failed
Requested Media: Printed

Edit View Local Resources ⋯

Centralized managing requests

- Central Resources Sharing nodes were created
  - **SISIB** at Universidad de Chile - 3 staff.
  - **Law Library** at Universidad Católica - 6 staff.

- Responsibilities:

  1. Staff training in nodes and libraries.
  2. Reception and shipping of material from and towards partner's central node.
  3. Reception and devolution of material from and towards local libraries.
  4. Requests management

Book delivery and pickup service
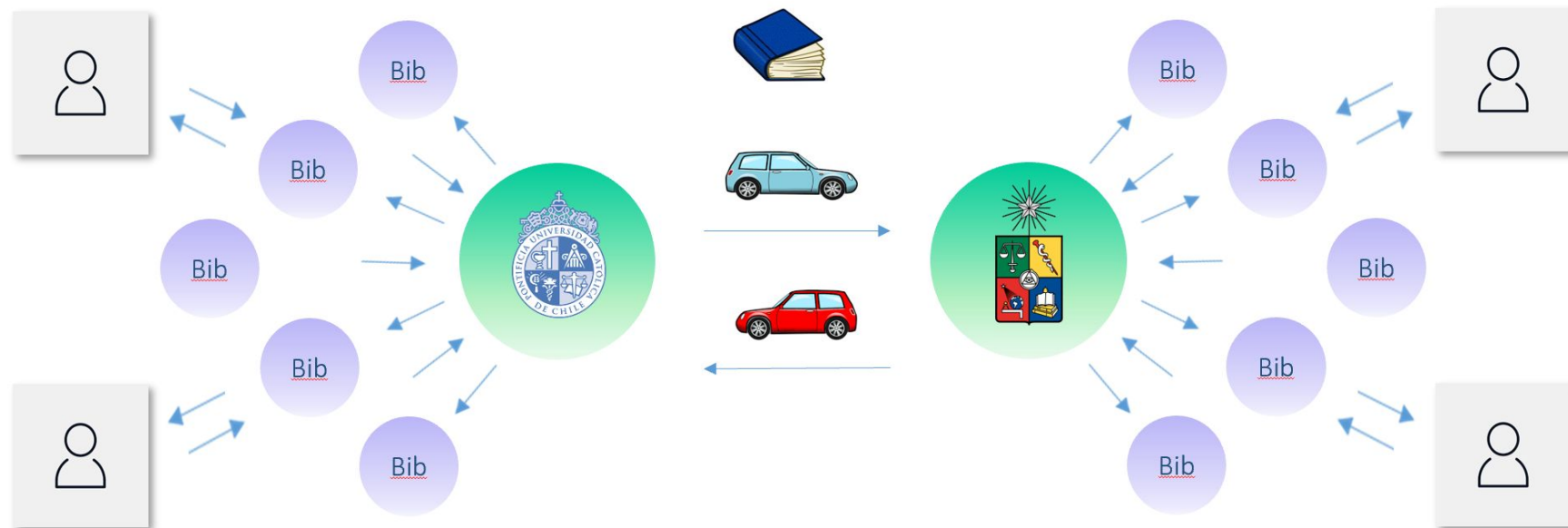
- Book transfer rounds:
  Tuesday from UC to UChile, 10:30 hrs.
  Thursday from UChile to UC, 15:00 hrs.

Communications between partners

- Emails, generated vía Alma or directly
- Telephone calls, WhatsApp
- Zoom meetings
- **General notes** in requests

| General Information | History | Rota | Parameters | General Messages | Notes | Received Items | Attachments |

	Created On	Updated On	Updated By	Note	
1..	18/08/2022	18/08/2022	VERA JERIA, MARTA TRINIDAD	PRESTAMO PIBI RECIBIDO 18.08.22	...
2..	18/08/2022	18/08/2022	VERA JERIA, MARTA TRINIDAD	[Receive] Nota:PRESTAMO PIBI RECIBIDO 18.08.22	...
3..	18/08/2022	18/08/2022	-	[Ship] Note:Enviado a PUC 18-8-22	...

1 - 3 of 3   Created by   🔍   Update Notes ▾   ➕ Add Note ▾

Requests from Primo VE

- A dedicated **view** for the resources sharing service
- A **scope** to display/search only allowed collections of the partner
- Agreement of the terms of use of the service

Users going to pick up material

- Users who prefer to browse the partner's shelves.

- A workflow was designed, including:

  - Access control and authentication using Primo VE

  - Consultation of blocks and overdues

  - Request in place

  - Notification to partner to register

    the loan

Universidad de Chile
Vicerrectoría de Asuntos Académicos
Dirección de Servicios de Información y Bibliotecas (SISIB)

Procedimiento para PIB presencial entre Universidad de Chile y Universidad Católica de Chile

➢ **Solicitud presencial de un usuari@ PUC en una biblioteca UChile**

1. Al momento de ingresar a la biblioteca, el/la usuari@ PUC deberá iniciar sesión en bibliotecas.uc.cl para comprobar que está vigente en su institución (puede utilizar su celular, portátil o algún computador que se le facilite):
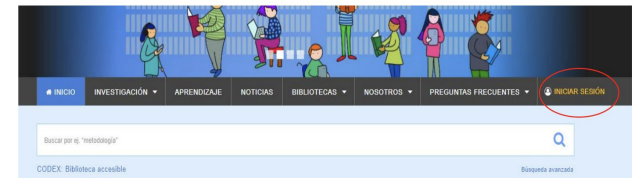
Workflow

Terms of use for the service

Service offer
➢ Send requested material in 5 business days to the selected pick up library
➢ Users can return the material in any library
➢ Users can renew and cancel the requests in the discovery system
➢ Get help or information via chat or email

Service Policy
➢ Thesis and General collections can be requested
➢ 7 days loan, 1 renewal
➢ 3 requests maximum
➢ 48 hours to pick up the physical item

Requirements
➢ User account must be valid
➢ User account must not have overdue loans or blockages
➢ User must agree the term of use and fill the form

Resources Sharing requests

Owner Library	Lending Library	Borrowing Library	Pick up/return Library	User

4. Receives the request

3. Request a copy

2. Locate and send request to partner

1. User sends the request

5. Scan the submitted material

7. Scan the received material

9. Receives the material

12. Scan the received material

6. Send to Lending Library

8. Send material to Borrowing library

10. Scan the received material

13. Notifies the user

11. Send to Pick up Library

14. Manages the loan

15. Loan/Renew

20. Receives returned material

19. Return material to Lending Library

17. Receives returned material

22. Receives returned material

16. Return

21. Sends material to owner library

18. Send to Borrowing Library

Requests sent from Primo VE

Request to move temporally

Shipping physical material

Receiving physical material

Loan to the user

Returning material to the partner

Gestionar la devolución de ejemplares

Escanear código de barras del ejemplar * `00646210010017` ☰ Aceptar

El destino del ejemplar es:

El destino del ejemplar es: **Recursos Compartidos (PIB)**

1 ☐ **Principios de Ciencia Política**
Libro Por Lucas Verdú, Pablo. (Tecnos 1973)
ISBN: 8430907319
Número OCLC: 22197801
ID MMS: 991007864852003936

Identificador externo: 56UDC0002033
Identificador interno: 6883257480003936
Estado de la solicitud: Devuelto por usuario
Socio: Pontificia Universidad Católica de Chile
Medio solicitado: Cualquiera
Solicitante: Romero Buccicardi, Catalina 🔖
Fecha de vencimiento: 01/09/2022
Recoger en: Arquitectura y Urbanismo
Nivel de servicio: Normal (Completo)
Formato solicitado: Físico
Fecha de creación: 18/08/2022 13:36:03 CLT
Fecha de actualización: 22/08/2022 18:24:59 CLT

Código de barras: 00646210010017
Solicitud con notas activas

Editar Vista ursos locales ...

D   ar
E   consulta al usuario
E   gastos de envío
Devolución
Mensaje general
Estado de la consulta
Reasignar
Cargar fichero

What's coming

➢ In the future, it is intended to extend this agreement to other academic libraries using Alma.

➢ Incorporation of electronic material to the Integrated Interlibrary Loan, the UC is carrying out a pilot experience with the HUC consortium. The aim is to achieve this exchange of documents through the Alma functionality.

➢ It is expected that the process will be fully automatic, making the request go directly to the lending library, without borrowing library's mediation.

➢ It is expected to have a fully automated procedure for cases in which the user needs to review the material in person at the partner library before requesting it as a shared resource.

Conclusions

Benefits

➢ The digital transformation of a service associated with a paper form now being managed through an online application, making it more sustainable.

➢ The user can know in advance the material to be requested through the integration of the catalogs of both institutions, according to policies of the service.

➢ The RS process between both institutions has improved the tracking of material and gathering of statistics.

Benefits

➢ The user receives the requested material in the selected pick up library, and does not need to go to the lending library, improving the service to the user in terms of time.

➢ The user can request, receive and return material at a selected library.

➢ Collaboration between both institutions has improved the service to our users.

Positive users feedback

Rocko's Sad Life @crist_matjp · Aug 15
Replying to @uchile
Qué buena noticia.

David Cortez @dvdcrtz · Aug 15
Replying to @uchile
👏👏👏

rubenrojasautor Un gran convenio de préstamos ínter bibliotecarios que favorece a ambas casas de estudios. Felicitaciones
1 sem   5 Me gusta   Responder

Felipe Bahamondes Cid · 2nd   1w ···
CEO · Dictuc

Genial, un anhelo desde hace muuuuucho tiempo, finalmente concretado!

Marcela Sepulveda
August 9 at 9:16 AM · 🌐

Esta si que es una excelente noticia!!!

Patricio Velasco F. @pvelascof · 20 ago.   ···
Una EXCELENTE noticia, ojalá muy pronto se integren más universidades.

disenomj asombroso !!!🙌🖤🖤🖤

_benjamnz qué buenaa🖤
2 días   1 Me gusta   Responder

Thanks