

Alma Rapido/Peer-to-Peer Hybrid Pod (EASTSP) Configuration Highlights



Partnership Among South Carolina Academic Libraries

Configuration Highlights

- Related Documentation
- Creating A Resource Sharing Directory Record
- Adding New Partners
- Joining A New Pod
- Temporarily Disabling Services
- Helpful Tips
- Troubleshooting



PASCAL-Specific Documentation

- Shared documentation is PASCAL Consortium-specific
 - We receive items through the Resource Sharing Library
 - This requires transiting between branches
 - This subsequently requires configurations for a branch library: temporary locations and library relationships



Other Included Configs

- Creating Workflow Profiles
- Configuring Due Dates
- Creating Overdue & Lost Loan Profiles
- Creating Item Policies
- Configuring Temporary Item Creation Rules
- Configuring Fulfillment Unit Rules



Other Included Configs, Continued

- Creating an Electronic Document Delivery Rule
- Creating a Digitization & Copyright Rule
- Enabling Letters



Creating An RS Directory Entry



Create A Resource Sharing Directory Entry

- A Directory Record allows other institutions to discover your library and download your Partner Record, forming a connection and thereby a reciprocal partnership. Records store contact data, contain lending policies, pod terms, etc.
- Config > Fulfillment > Contribute to Resource Sharing Directory > Resource Sharing Directory Member > Add new member > follow steps as desired



Create A Resource Sharing Directory Entry

Member Attributes	Physical Items Lending Policies	Digital Lending Policies
-------------------	---------------------------------	--------------------------

Member Attributes

Institution Name

Citadel Military College of South Carolina

Name *

Citadel Military College of South Carolina

Description

Member of the PASCAL consortium - contact sharedsystem@pascalsc.org before adding



Adding Partners



Copy & Edit Partner Records

- Partner Records define communication protocols, addresses, and workflow configurations between libraries for borrowing and lending. You need at least one Partner Record in place to create a rota template.
- Fulfillment > Resource Sharing > Partners > toggle to Community tab > search for partner > click the row actions menu > Copy > toggle to the Institution tab > search for partner > click the row actions menu > Edit > update the Workflow Profiles, Holdings Code (if needed), and Expiry Time on the Parameters tab > Save



Copy & Edit Partner Records

General Information	Contact Information	Parameters	Notes	Attachments
---------------------	---------------------	------------	-------	-------------

Code *	01WRLC_AMU_AMERICAN_UNIVERSITY_LIBRARY	Name *	American University - American University Library (Comm
Profile Type *	ISO	Status	Active
System Type *	Alma		
Average Supply Time	0	Delivery Delay (days)	0
Alternate Account Number		Alternate Symbol	
Currency	US Dollar		
Locate Profile	American University - American University Library (Communit	Institution Code	01WRLC_AMU
Holdings Code			
Supports Borrowing	☒	Borrowing Workflow	P2P_IN



Update Locate Profiles

- Locate Profiles define how a library searches a partner's catalog to see if a requested item is owned and available.
- Config > Fulfillment > Resource Sharing > Locate Profiles > search for partner > click the row actions menu > edit > toggle to the Locate Profile Parameters tab > edit as appropriate > Save



Update Locate Profiles

Institution * 01WRLC_AMU

Alma Network ☐

Check item availability ☒

Ignore Electronic and Digital Resources ☒ [i](#)

Check item requestability ☒

Allow locate by metadata ☐

Locate by fields ☒

Locate only if all fields match ☐ Yes ☒ No [i](#)

☒ Author	☐ Barcode
☐ DOI	☐ Edition
☒ ISBN / ISSN	☒ LCCN (010)
☒ System Control Number	☐ Other Standard ID
☒ Title	



Create/Update Rota Template

- Rota Templates generate a rota, or lending string, for each individual request using a specified list of libraries. Rota Templates can be either ordered or unordered; PASCAL uses unordered templates for general load-balancing.
- Fulfillment > Resource Sharing > Rota Templates > locate correct template > click the row actions menu > Edit > toggle to the Template Members tab > Add Partners > search for the correct partner(s) > click Add Partners > Save



Create/Update Rota Template

▲ Name	↕ Code	↕ Profile Type
University of Central Florida - UCF Main UBorrow/ILL Library (Community)	01FALSC_UCF_UCF_MAIN_UBORROW/ILL_LIBRARY	ISO
Binghamton University - Bartle Library (Community)	01SUNY_BIN_BARTLE_LIBRARY	ISO
University at Albany - Resource Sharing Library (Community)	01SUNY_ALB_RESOURCE_SHARING_LIBRARY	ISO
University at Buffalo - University at Buffalo Libraries Annex (Community)	01SUNY_BUF_BUFFALO_CENTRAL_RESOUR...	ISO
SUNY Oswego - Penfield Library (Community)	01SUNY_OSW_PENFIELD_LIBRARY	ISO
SUNY Plattsburgh - Feinberg Library (Community)	01SUNY_PLA_FEINBERG_LIBRARY	ISO
SUNY Purchase - Purchase College (Community)	01SUNY_PUR_PURCHASE_COLLEGE	ISO
Stony Brook University - Resource Sharing Library (Community)	01SUNY_STB_RESOURCE_SHARING_LIBRARY	ISO



Create Rota Assignment Rule

- Rota Assignment Rules are an ordered table of Rota Templates, set up by format. Alma reads the table from top to bottom, so ensure that the first rule on the table contains the rota you prefer that Alma checks first in the sequence.
- Config > Fulfillment > Resource Sharing > Rota Assignment Rules > Add Rule > edit as appropriate > Save > order the table



Create Rota Assignment Rule

Move Up	Move Down	Rule Name	Description
		Copy of PDD1	PASCAL Delivers Digital 1
		Copy of PDDlast	PASCAL Delivers Digital Last Resort
		Copy of NZ Rota Assignment Rule	NZ Rota Assignment Rule
		P2P Carolinas	P2P Carolinas
		P2P LOAN	P2P LOAN
		P2P EASTSP	P2P EASTSP
		P2P Midwest	P2P Midwest
		P2P West	P2P West
		P2P Nationwide	P2P Nationwide
		Tipasa	Tipasa



Create Sending Borrowing Request Rule

- Sending Borrowing Request Rules determine whether a request is sent automatically or waits for staff review.
- Config > Fulfillment > Resource Sharing > Sending Borrowing Requests Rules > Add Rule > edit as appropriate > Save > order the table



Create Sending Borrowing Request Rule

Sending Borrowing Request Rules

Name *

P2P Send Automatically

Description

P2P Send Automatically

Created By

Mason Smith, Maggie

Updated By

Mason Smith, Maggie

Input Parameters

	Name	Operator
1	Requested Format	=

Output Parameters

Send Request *

True

▼



Joining A New Pod



Attach Participating Items to Pod

- Always remember to attach participating items to any new pod you join! If you forget, Alma may send your library requests for anything!
- Config > Fulfillment > Contribute to Resource Sharing Directory > Resource Sharing Directory Member > click the row actions menu > Edit > toggle to Physical Items Lending Policies tab > find the correct pod > click the row actions menu > Edit > choose the appropriate Participating Items option from the dropdown menu > Save > Save



Attach Participating Items to Pod

Participating Items	Lendable Items			▼		
Supply Term For	All Pod Member ▼					
Delivery Time *	7	Loan Period *	84	Cost *		USD
Allow Renewal	☒	Renewal Cost		USD	Maximum Renewals Allowed	1
Allow Automatic Renewals	☐					
Allow Rush	☐					
Expiry Time (Days)	4					



Temporarily Disabling Services



Disable Individual Pods

- To disable an individual pod:
 - Toggle *off* the Rota Assignment Rule
 - If a specific one exists that will not impact any other service, Toggle *off* the Sending Borrowing Request Rule



Disable Individual Pods

	Enabled	Move Up	Move Down	Rule Name
1	☒		v	Copy of PDD1
2	☒	▲	v	Copy of PDDlast
3	☒	▲	v	Copy of NZ Rota Assignment Rule
4	☒	▲	v	P2P Carolinas
5	☒	▲	v	P2P LOAN
5	☒	▲	v	P2P EASTSP
7	☒	▲	v	P2P Midwest
8	☒	▲	v	P2P West
9	☒	▲	v	P2P Nationwide
10	☒	▲		Tipasa

	Enabled	Move Up	Move Down	Rule Name
1	☒		v	P2P Send Automatically



Update Library Details

- Update Library Details to temporarily disable borrowing or lending at any time.
- Config > update Configuring: [library] > Fulfillment > Library Management > Library Details > check box for “Temporarily inactive for borrowing” AND/OR “Temporarily inactive for lending” > Save



Update Library Details

BORROWING SETUP

Cancel request on locate failure ☒

Automatically activate locate profile ☒

Temporarily inactive for borrowing ☐

Default location Closed Location Type: Borrowing Resource Sharing Requests ▼

Default pickup location Daniel Library ▼

Extend due date when renew requested ☐



Helpful Tips



Configurations Never End!

- Keep an eye on the Alma Release Notes -
 - PASCAL has opted to:
 - Enable Data Sharing
 - Configure Working Days
 - Configure Hold Shelf Period



Enable Data Sharing

- The Data Sharing Profile for Resource Sharing allows P2P libraries to add their records to the Global Title Index, making them discoverable to Rapido library patrons.
- Config > General > General Configuration > Data Sharing Profile > toggle Yes for Resource Sharing > Save



Configure Working Days

- Working Days are, counterintuitively, the days of the week your library does *not* process ILL requests, to prevent requests from expiring on those days.
- Config > Fulfillment > Resource Sharing > Resource Sharing Working Days > choose days > Save



Configure Hold Shelf Periods

- Resource Sharing Hold Shelf periods can be either the Circ Desk Limit (for example, 5 days or 7 days) or the request due date (in the case of EASTSP items, 12 weeks).
- Config > Fulfillment > General > Other Settings > search for “rs_hold_shelf_expiration” > click the row actions button > Customize > edit as needed > Save



Create Tracking Widgets

- Create P2P tracking widgets via an Analytics Objects report

P2P Borrowing Totals Last 30 Days

[Open in a new window](#)

P2P Borrowing Totals Last 30 Days

Institution Name	Borrowing Creation Date	Item Arrival Date	External Identifier	Borrowing Request Status	Title	A
Citadel Military College of South Carolina	5/5/2025	5/19/2025 7:19:04 PM	01PASCALCITAD0013135	Deleted	Atlantic Passages: Race, Mobility, and Liberian Colonization	M R
	4/14/2026	4/20/2026 9:47:04 AM	01PASCALCITAD0017884	Returned item to partner	On Feathers and Furs: The Animal Section in Duan	C B



Update Your Address

- Alma runs a job overnight to redistribute partner addresses, so keep your library's address up to date!
- Config > update Configuring: [library] > Fulfillment > Library Management > Library Details > toggle to the Contact Information tab > click the row actions menu > Edit > edit as appropriate > Save > Save



Troubleshooting



Did you double-check...?

- It's Alma, so things will be weird.
- The Borrowing or Lending Request List
- The Fulfillment Unit Rule Table and/or TOUs
- Workflow Profiles
- Calendar Hours



Ask For Help!

- It's Alma, so things will be weird.
- Your partners (and their friends) are your friends!
- Use the EAST Resource Sharing Directory and Listserv
- Be patient - the configs may be ridiculous, but when done, processing is suspiciously easy



QUESTIONS?

Maggie Mason Smith, PASCAL, maggie.smith@pascalsc.org