

# A Fulfillment Round Table: Invisible Convenience

How Iowa universities use  
Ex Libris Alma for seamless  
interlibrary lending





In February 2018, Ex Libris hosted a round table with representatives from the University of Iowa and Wartburg College to discuss their experiences with Alma's fulfillment capabilities in a broad library consortium.

### University of Iowa

- Brian Thompson, Systems Librarian, University of Iowa Libraries

### Wartburg College

- Todd Vandenburg, Information Literacy and Technology Librarian, Vogel Library

### Ex Libris

- Yotam Kramer, Director of Product Marketing
- Moshe Shechter, Product Manager



## About the University of Iowa

The University of Iowa is a public research university in Iowa City, Iowa. Founded in 1847, it is the oldest university in the state. It has 11 colleges, which offer undergraduate and graduate education, as well as professional education and training. The school has over 33,300 students from 114 countries and all 50 states.

The University of Iowa Libraries is the largest library system in Iowa, with eight separate facilities (one main library, six specialist or subject-specific libraries, and one library annex). In total, the University of Iowa Libraries collection includes more than six million volumes.

## About Wartburg College

Wartburg College is a private liberal arts college founded in 1852 and affiliated with the Lutheran Church (ELCA). Currently located in Waverly, Iowa, the college has over 1,500 students from 30 US states and 55 countries, and 96 full-time faculty.

The Vogel Library serves the Wartburg community with a collection of more than 140,000 volumes. The library has three librarians, four other staff members and 25 student employees.

## About Ex Libris Alma

Alma is a secure, scalable end-to-end library software system (ILS) for managing the acquisition, sharing, cataloging, and use of all kinds of resources, including physical and electronic books and periodicals, and other digital resources (such as audio, image, and video files). Alma supports the entire workflow — selection, acquisition, metadata management, digitization, and fulfillment — for the full spectrum of library materials, regardless of format or location.

## About the Alma Fulfillment Network

Alma Fulfillment Network is the infrastructure and processes by which institutions using Alma can collaborate to provide their patrons access to resources across the network. This can include:

- Walk-in loans - A patron of any member institution can walk into a library of any other member institution and, from a fulfillment perspective, directly obtain the same service and resources as a patron of the lending institution.
- Unmediated direct requests - Patrons of one institution can discover resources held at another member institution and directly request fulfillment by the owning institution.
- Return anywhere – A patron at one institution can return a checked-out resource from another institution at their “home” institution.
- Pick-up anywhere - A patron can pick up a resource from any member institution at their “home” institution, at the lending institution, or at any other institution in the network.

In all cases, the resource-owning library directly manages all aspects of the loan cycle with the requesting patron. To support this cross-institution collaboration and joint workflow processing, Fulfillment Network member institutions define relationships among them for the sharing of user information.





**The best convenience is invisible convenience. And that kind of seamlessness is the best part of the Alma Fulfillment Network.”**

[Todd Vandebark](#)

Information Literacy and Technology Librarian at Wartburg College



# The Background

The US state of Iowa has no mandated academic resource sharing or use of common systems that encompasses all institutions. Therefore, libraries organize into different consortiums or collaborative networks of varying sizes to share resources and services.

Todd Vandembark explained that, prior to 2015, the library at Wartburg College was sharing an integrated library system (ILS) with three other academic libraries (University of Northern Iowa, Hawkeye Community College, and Allen College) and several public libraries. The ILS was hosted at the University of Northern Iowa, for which the university collected fees.

When the system was no longer serving the needs of all users, the public libraries chose to transition to another solution. The four academic institutions decided to maintain their relationship for resource sharing as a consortium, of sorts, using Ex Libris Alma and Primo.

The University of Iowa was using ILLiad and uBorrow from Relais for interlibrary loan activities among the “Big Ten” universities (Michigan, Northwestern, Michigan State, Purdue, Illinois, Penn State, Minnesota, Wisconsin, Ohio State, Iowa, Indiana, Rutgers, Maryland, and Nebraska). An ongoing courier service is in place among the libraries of these institutions.

## Were the University of Iowa and Wartburg College libraries sharing resources before the transition to the Alma-based network?

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Brian Thompson said that the University of Iowa was not in a direct sharing relationship with the Vogel Library beforehand, nor with many other libraries with which the university is now able to directly share resources. Although there was some ad hoc resource sharing across non-collaborating academic institutions, it was not organized or quickly accomplished.

# The Solution



The University of Iowa and Wartburg College are now part of a group of academic libraries using the Alma Fulfillment Network of Ex Libris. This network, known locally as the Two Rivers Alma Collaborative (TRAC), includes nine libraries, which use the STAT Courier service.

## How was the set-up of Alma and the Fulfillment Network?

For Wartburg College, the process of transitioning to Ex Libris lasted from initial data gathering for Alma in September 2015 to “go live” in June 2016. The library decided to delay implementing the resource sharing capabilities for a year, in order to get used to the new Alma system and to create an effective fulfillment network.

Brian noted that a loose collaboration already existed among libraries using Alma, like the University of Iowa, so when the Alma Fulfillment Network option became available it was the natural choice. The University of Iowa worked with Ex Libris for two months to implement the Fulfillment Network, during which they found the company to be very helpful, providing guidance and configurations on the server end.

“If we had to do it on our own,” Brian commented, “it would’ve taken a lot longer and would’ve been a lot more difficult.” The university library was entering new territory, so working with Ex Libris was “a good learning process for us.”

Todd: “I second that.”

As part of the implementation process, the Vogel Library team and Ex Libris set up scenarios and dummy users to help predict and mitigate potential issues.

Todd also noted, “The Ex Libris documentation was clear and helpful.”

Brian summarized the importance of clarity in the documentation by describing the complexity of the Fulfillment Network: “It gets pretty complex among all the member libraries – there’s a lot of moving parts.”

### *Did you define different access permissions in the system?*

Both Brian and Todd noted that the only limitation on the patron side is membership in their respective university communities. Unaffiliated area residents, who may be able to access local institutional resources, do not have access to the Fulfillment Network.

### *Are you using Primo to allow cross-library search at the patron level? How?*

Each institution in the Fulfillment Network has a different method of search and display. As the Primo interface is fully configurable, they are able to meet their individual institutional needs and respective comfort levels. What makes this even more interesting is the fact they have no shared catalog and are still able to set up a joint discovery and delivery service by using Primo setup and the Alma Fulfillment Network.

*As an effective Fulfillment Network requires sharing patron details, did you find that this raised any privacy issues?*

Both Brian and Todd smiled in response to this question, with Brian adding, "That was a bit of a touchy subject."

As a result of the concern over privacy issues, member institutions do not share sufficient information to effectively pursue billing for lost items. The case has to be handled by the patron's "home" institution. Acknowledging that all member institutions agreed to limiting the exchange of patron data, Brian commented, "Basically, we did it to ourselves."

In practice, for the purposes of interlibrary fulfillment, the Iowa institutions only share the name of the patron, their institution, the type of patron (student, faculty, etc.), and their email.

*Do you have special policies and workflows for requests via the network, such as limitations on pick-up locations, renewals, recalls, overdues, and such?*

There are definitely separate policies, Brian noted, but the network workflow is essentially the same as the library's normal lending procedures with separate terms of use. Overdue books, for example, are handled the same internally as through the Fulfillment Network. On the other hand, "we don't allow for recalls on our part, except in an extreme case in which we need the item back for course reserves."

Both libraries have no daily overdue fines. However, once an item is deemed to be lost, then there is a standard \$100 fee imposed. As noted, this may require the involvement of the patron's home institution in billing and collecting the fine.

Additionally, there are no renewals among member institutions. Resources are lent out for a relatively long period of time, 90 days, so patron renewals were not deemed to be necessary or desirable.

As far as resource pick-up is concerned, the network members ensured that a patron could receive a resource from any library at any institution. For example, a University of Iowa student could request an item from Wartburg College and physically pick it up at Iowa State University, seamlessly and without delay.

# The Results and the Reactions



## What is your overall opinion of the Alma Fulfillment Network?

Brian: "Pleased. It's been a definite improvement."

Todd: "I'll second that."

Brian added, "We like collaborating with Iowa institutions that we have not worked with this way in the past. It's been good."

Both representatives agreed that the more interlibrary requests are handled through the Alma Fulfillment Network, the more money and resources they save, while their patrons see much faster delivery times.

### *How fast is the turnaround in the network?*

Brian and Todd replied that turnaround for a request in the Alma Fulfillment Network is just 2 to 4 days. This is up to four times faster than a traditional interlibrary loan in both their legacy systems, which can take a week or more.

Todd noted one reason for this dramatic increase in speed is the expansion of the interlibrary courier service the University of Iowa had been using to include the libraries in the new Alma Fulfillment Network.

Additionally, Brian explained that the combination of the Fulfillment Network and the courier service has not increased costs. Quite the opposite, as institutions do not pay per item or destination, as is the case with other courier services. Rather, each member pays a global fee for the courier service as needed or desired (e.g., Wartburg College pays for three days a week, while the University of Iowa pays for five). The number

of members of the network or the quantity of requests, therefore, does not add any cost to the service for the individual institution.

### *How about staffing? Do you have dedicated staff for the Fulfillment Network or is it the same personnel as assigned to handling internal requests?*

Both Brian and Todd confirmed that they do not need dedicated staff members to handle Alma Fulfillment Network activities; rather, the staff assigned to general lending and borrowing for the library is quite able to handle the interlibrary requests as well.

Todd added that, currently, the Circulation Supervisor assists with interlibrary requests using the Fulfillment Network. However, prior to the Alma solution, only the ILL Supervisor and those students working with her were involved in what amounted to time-consuming and needlessly complicated interlibrary requests.

### *So, what do you like most about the service?*

Todd: "I find the interface easy to use and Alma analytics to be a powerful reporting tool." For the library patron, he noted, it is an advantage that the front-end uses the same credentials as other online activities at Wartburg. "That seamlessness is the best part," he said.

Brian said that his library team was excited about the fact that a member of any networked institution could walk into any other institution's library and use the card of their home institution without any special procedures. "We can easily and quickly look them up, and they can check out a resource as simply as from their home institution's library," he said. "We like this walk-in borrower aspect, not requiring a new user to be created each time someone from a different institution comes in to use our resources."

### *Have there been any reactions or feedback from your patrons?*

Neither Wartburg College, nor the University of Iowa have thus far made an effort to publicize the availability of the new Alma-based interlibrary loan network.

According to Todd, Wartburg patrons just see a standard interlibrary loan. And that is as it should be, he said, because “the best convenience is invisible convenience.” Nonetheless, Todd noted that those people directly informed about the efficiencies of the new system seem to be impressed.

Brian said that the University of Iowa is considering going in the same direction of “invisible convenience,” by removing interlibrary loan options from the patron side. Instead, if an item was not available locally, then a user’s request would simply state what was needed and “we on the back end will make sure they get it. That would be optimal.”

This is not to say that there has been no feedback whatsoever. Brian noted that patrons from St. Ambrose College – about 60 miles away from the University of Iowa – have said they are very pleased to be able to come into the university library and easily check out what they need.

## What’s Next?

Looking down the line a bit, Brian said: “We’ve talked with other institutions moving to Alma about joining the Fulfillment Network. They expressed an interest about joining once they are up and running.”

Regarding other possible changes in the future, Todd said he’d like to see Alma analytics reports that cover all member institutions, which are automatically created, shared and made accessible, and that incorporate cross-institution analytics. As of today, he said, each member of the Alma Fulfillment Network runs Alma analytics on their own institution’s data. Then, the resulting reports are deposited in one online location for a staff member at Iowa State to create a collated report, which is then sent to all members. An automated, connected system would be more consistent and efficient, Todd noted.

Brian summed up the broader possibilities Alma brings to the table:

*“Just knowing that we are on the same Ex Libris systems, means we can think about other ways to collaborate in the future.”*



## About Ex Libris

Ex Libris, a ProQuest company, is a leading global provider of cloud-based solutions for higher education. Offering SaaS solutions for the management and discovery of the full spectrum of library and scholarly materials, as well as mobile campus solutions driving student engagement and success, Ex Libris serves thousands of customers in 90 countries. For more information about Ex Libris, see our website, and join us on Twitter, Facebook, YouTube, and LinkedIn.

