
Alma Resource Sharing Lending Workflow

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Alma Resource Sharing Lending Workflow

1. Book Loans: Currently at: Resource Sharing Library Make sure you are in Unassigned and the Activity Status is Active

- Alma icon or F2>Lending>Actions>Add>From Search>Find: All Titles: Keywords: Enter System Number or ISBN>magnifying glass>Mark Radio button>press Select
- Fill in: Supplied To: Lending Partner code>Owner: Resource Sharing Library is filled in automatically>External Identifier: Order Number>SAVE
- Manage Fulfillment Options> Place Request (Blue)>Ship physically>Submit>
- Check Available Column: 1 = On shelf, 0 = On loan
- For multivolume book, place additional Requests as required
- Request status changes automatically from Created Lending Request to Being Processed
- Itur will collect from shelf and bring books here the next day
- Shipping Items>Automatically Print Slip YES>Scan Barcodes one after the other, press enter or OK. Slip is printed.
- If more than one volume, choose Multiple Items and scan each barcode separately
- Status becomes Shipped Physically.
- Make sure books have green vouchers and date stamp. If OCLC make sure has English stamp in book and print labels and straps in OCLC.

Replies: Select record v

o Reject Request: Edit>Request Note>XOL, XPN, XCK, XNA-PL>Reject>Choose Reason>Status changes to

Rejected Borrower Request>Send General Message with reply code, by email. o General Message: Can send any free text email message directly to Partner> e.g. STILL ON LOAN, N.O.S.

WILL YOU WAIT? Copy of message appears in Attachments and General Message tabs. o Will Supply: Edit>Request Note>XNT-QRS> Will Supply>Choose Reason>Mail will be sent directly to

Partner and status will update to Will Supply.

- Edit>Audit to check actions performed

2. Articles from EJOURNALS: Currently at: Resource Sharing Library Make sure you are in Unassigned and the Activity Status is Active

- Alma icon or F2>Lending>Actions>Add>From Search>Find: All Titles: Keywords: Enter System Number or ISSN>magnifying glass>Mark Radio button>press Select>Choose record from Institution or from Community Zone and mark Radio button>Select>SAVE
- Fill in: Supplied To: Lending Partner code, Owner: Resource Sharing Library auto fills, External Identifier: Order Number, Format: Digital>SAVE>access from Facets Created Lending request> EDIT (make sure publication date is correct, add author, title and pages)
- Check Electronic holdings
- Supply via: General Message: <http://lib.haifa>
- Ship Item>Mark "Complete the Request">Make sure is Digital>Automatically Print Slip - No>Ok.
- Status becomes Request Completed.

Replies:

o Reject Request: Edit>Request Note>XPN, XPN YEAR, XPN VOL., XCK, XNA-PL VOL.>Reject>Give Reason>Status changes to Rejected Borrower Request - email is not sent to Partner>Send mail via General Message. o Will Supply: Edit>Request Note>Currently No Access, Checking o General Message: Any free text reply o Edit>Audit to check actions performed, Attachments to see copies of letters.

3. Scans from PRINT JOURNALS Currently at: Resource Sharing Library Make sure you are in Unassigned and the Activity Status is Active

- Alma icon or F2>Lending>Actions>Add>From Search>Find: All Titles: Keywords: Enter System Number or ISSN>magnifying glass>Mark Radio button>press Select>Choose record from Community Zone and mark Radio button>Select>SAVE
- Fill in: Supplied To: Lending Partner code, Owner: Resource Sharing Library auto fills, External Identifier: Order Number, Format: Digital>SAVE + EDIT (make sure publication date is correct, add author, title and pages)
- Check Physical or Electronic holdings
- Print Slip OR control + p and add call no.
- Collect from shelf
- Scan
- Supply via: General Message: <http://lib.haifa>
- Ship Item>Mark "Complete the Request">Make sure is Digital>Automatically Print Slip - No>Ok.
- Status becomes Request Completed.
- Edit>Audit to check actions performed. Attachments to see copies of letters.

- Return item to Circulation Dept. to: English Journals or Hebrew Journals trays

Replies:

- Reject: Change status to> Rejected Borrower Request and send General Message: e.g. XPN, XPN YEAR, XPN VOL., XCK, XNA-PL VOL.,TOO TIGHTLY BOUND TO SCAN, Pls. give more details such as article title and pages, pls. give s.n. or isbn for Arabic item.
- Will Supply: On Loan, requested
- General Message: N.O.S. - STILL SEARCHING, WILL YOU WAIT?

4. Scans from BOOKS: Currently at: Resource Sharing Library Make sure you are in Unassigned and the Activity Status is Active

- Alma icon or F2>Lending>Actions>Add>From Search>Find: All Titles: Keywords: Enter System Number or ISBN>magnifying glass>Mark Radio button>press Select>Choose record from Community Zone and mark Radio button>Select>SAVE
- Fill in: Supplied To: Lending Partner code, Owner: Resource Sharing Library auto fills, External Identifier: Order Number, Format: Digital>SAVE + EDIT (make sure publication date is correct, add author, title and pages)
- Check Physical or Electronic holdings
- Collect from shelf
- Scan
- General Message: <http://lib.haifa>
- Ship Item>Mark "Complete the Request">Make sure is Digital>Automatically Print Slip - No>Ok.
- Status becomes Request Completed.
- Edit>Audit to check actions performed. Attachments to see copies of letters.
- Return to Circulation Dept. to Second Return table or to Reserved Books tray

Replies:

- o Reject: Change status to> Rejected Borrower Request and send General Message: e.g. XPN, XPN YEAR, XPN VOL., XCK, XNA-PL VOL.,TOO TIGHTLY BOUND TO SCAN, Pls. give more details such as article title and pages, pls. give s.n. or isbn for Arabic item.
- o Will Supply: On Loan, requested
- o General Message: N.O.S. - STILL SEARCHING, WILL YOU WAIT?

5. Books Returned by Partner

- Fulfillment>Return Items (ALT + R) Scan barcode>Return to Circulation Dept. to Second Return table.
- Status becomes Request Completed.

6. Rejected Borrower Requests e.g. Wrong book, wrong volume of book/journal, tight binding/torn or missing pages or Lender Cancels request>Press Reject>Hold Request will be cancelled. Send reason via General Message.

Viewing Requests in Catalog or Fulfillment: Choose Physical Items>Keyword>system number/barcode etc...>Other details or three dots.

7. Renewals/Recall/Overdues Renewals (special requests):

- The Renew option only appears for Shipped Physically and Overdue Items. Recalled items need to be changed to Shipped Physically in order to renew
- Choose Renew and enter new date, the status becomes Received by Partner>change manually to Renew Requested.
Recalls:
 - If our patron requests an item that is on loan to the Resource Sharing Library a Recall letter is sent to the partner in Hebrew from Circulation and the due date is reduced to two weeks from date of request.
 - If the eight-week loan period is nearing, a Recall letter in English will be sent to the partner from Resource Sharing.
- Overdues:
 - When the due date passes, an Overdue notification is sent to the partner (and one hour later a Recall notification is sent which changes the status to Recall).
 - Subsequent Overdue notifications are sent every 4 days, the status becomes Overdue.

Shipping Costs: Shipping costs are entered automatically for every partner based on the Shipping Cost Lending Rules. If the quality is bad or we supply TOC free, must change the Shipping Cost to 0.00 nis manually before shipping.

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