

# Alma Resource Sharing

## Lending Workflow

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### 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**

- **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.
- **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.
- **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:**

- **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.
- **Will Supply**: Edit>Request Note>**Currently No Access, Checking**
- **General Message**: Any free text reply
- **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:**

- **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?

### 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.