Alma Resource Sharing
Borrowing Workflow

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1. **Book Loans (received via Primo):**
Currently at: **Resource Sharing Library**
Make sure you are in **Unassigned** and the Activity Status is **Active**

- Tasks>**Borrowing Requests - New - with No Partner – Unassigned or** Facets>**Created Borrowing Request**
- Select EDIT to show the full details of the request
- Add **ISBN** from ULI/OCLC
- **Requested Format: Physical**
- **Maximum Fee**: budget number, salary (99999)
- Check ULI>copy system number
- **Delivery Location** is automatically filled in **as Deliver to Library**
- **Requested Pickup Location** is automatically filled in as **Resource Sharing Library**
- Check **Notes** and remove from **Request Note** if irrelevant to partner
- **Add Partners**>Choose partner> Choose one from list or Find + GO>Radio Button>SELECT
- **Request Note**: Paste system number and loan period>SAVE
- SEND

2. **Book Loans (received via email):**
Currently at: **Resource Sharing Library**
- **Actions**>Add>**From External Resource**>Find: In profile: ULI>GO>Radio Button>Select
- Fill in Requester ID from drop down
- **Delivery Location** is automatically filled in **as Deliver to Library**
- **Requested Pickup Location** is automatically filled in as **Resource Sharing Library**
- **Requested Format: Physical**>SAVE + EDIT
- Add **ISBN** from ULI/OCLC
- Check ULI>copy system number
- **Add Partners**>Choose one from list or Find + GO>Radio Button>SELECT>
- **Request Note**: Paste system number and loan period>SAVE or SEND

3. **Requests that need an extra check:**
- Year doesn't match volume/edition
- Not found as cited in Databases, ULI/ULS/OCLC.
- Not for loan
Add Partner HAI and write relevant code in Request Note XPN, XPY, XCK, XOL ETC...

4. **Replies:**
Cancelled by Partner>Send **Query to Patron**>Not for Loan/Lost etc... Choose**: Waiting for Cancel Response**>Click Change Status. If there are additional partners, add then choose **Rota Tab** and remove irrelevant partner by pressing **Cancel** or **Reject**>Save. Then Send to new partner.
- **Cancelled by Patron**>**Request Sent to Partner**>**Cancel**>Confirm (do not mark Notify User)>Choose reason e.g. Duplicate request, Cancelled at Patron's Request>A cancellation letter will be sent to **Partner**>Status will change to **Cancelled by Patron or Cancelled by Staff**
- **Will Supply**>Send Query to Patron>e.g. Item is on loan in supplying library, N.O.S.>Add **Note** e.g. Due back on ...>Change status to: Will Supply.

- **General Message:** to send a **partner** a cancellation of a request that was sent in error. Write: "Please cancel".

5. Receiving books:

Currently at: **Resource Sharing Library**

- Find: **External Request I.D**. or title, or facets on left Status: **Request Sent to Partner**>**Physical**.
- **Receive**>**Automatically notify patron: NO**>**Received format: Physical**>**Automatically print slip: Yes**
  Patron Receive Cost is 15 nis (Israel) or 135 nis (abroad) or 0 nis (Technion)
- If only **One volume,** do not fill in barcodes or loan period.
- **More than one volume**: mark **Multiple Items** and Fill in **Temporary barcode** manually i.e. External Request I.D. +A>**OK**>Temporary barcode + B>**OK**>**DONE/GO.**
- If item has been **requested by Partne**r and the loan period is limited to less than 8 weeks, fill in **Due Date**
- **Partner Note**: e.g. Non-renewable, Damaged>**DONE/GO** - will appear on slip
- Send **Query to Patron**>**Arrival Letter - Book**>Check that status is now **Physically received by Library**
- [If need to print slip again: F2>**Scan in Items**>**Automatically print slip YES**>Scan item barcode>OK or enter>Destination: **On Hold Shelf**]
- Check **Maximum Fee** to see Payment Method i.e. budget number or salary code
- **Print arrival slip** from Outlook>**Alma Letters**, cut off redundant text, place in book
- Arrange books on shelf in Circulation Dept. by **Patron's Surname**
- Circulation staff will: **Print payment vouchers**>**Loan** book to patron at Circulation Desk for 8 weeks (**no renewals**).

If partner write "Shigur to Shigur" or "Orian to Orian" =2-week loan only.
Fill in Due Date and make sure it appears on arrival slip.

6. Removing Resource Sharing Fees:

Currently at: **Resource Sharing Desk**>Manage Patron Services >Patron i.d.>GO>Check **Active Balance** (if pay by salary or budget)>**Pay**>All fines or **Specific fines**>Add to Comment: **Budget No. (**appears in **Notes tab) or 99999**>Send (Email confirmation is sent to patron).

7. Returning books to Partners:

Currently at: **Resource Sharing Library**

- Open **Tasks**>Returned by Patron>**Return**>Print slip>**Yes**
  OR
  Open record by Title/External id number/Partner>**Returned by patron** (after it has been returned at Circ. Desk) or **Loaned to Patron**>Press **Return**>Print slip>**Yes**

- Request Status is changed to: **Returned item to partner**

8. **Renewals/Recalls/Overdues:**

- **Renewal (special request only):** Press **Barcode** to check **Due Date** in Fulfillment, if near due date, press **Renew Requested** do not choose new due date at this stage as a letter will not be sent to the Partner (we disabled this)>enter>status changes to **Renew Requested**>press **Renew** to change due date in patron's library account and send renewal confirmation letter. Status changes to **Renewed by Partner** in borrowing record, in **Manage Patron Services - Loan Status** appears as **Renewed**. Patrons cannot request Renewals via Primo (we disabled this).
- **Recall:** If FRT from other library, press RECALL and change due date to ONE week from today's date, then go into Fulfillment and **Change Due Time!** (Patron will received two letters!). Patrons also receive regular Fulfillment courtesy letters.
- **Overdue:** Courtesy and Overdues letters are sent via Fulfillment when the due date is nearing and has passed. In addition, a weekly Analytics report is sent to Lynne's email. To send manual Overdue Notification>enter record>send **Query to Patron**>change status manually to **Overdue**>

9. **Article and Book Chapter Scans (received via Primo):**
Currently at: **Resource Sharing Library**
- Tasks>**New Borrowing Requests with No Partner**
- EDIT to show the full details of the request.
- Requested Format=**Digital**
- **Delivery Location i**s automatically filled in as **Alternative Delivery** and **Requested Pickup Location** is automatically filled in as **Resource Sharing Library**
- **Maximum Fee:** budget number/salary
- **EDIT** Check has author, title and/or pages of journal/book chapter
- Add ISSN or ISBN from ULI/ULS/OCLC if missing>SAVE
- Check ULI/ULS for possible partners
- **Add Partners**>Choose partner> Choose one from list or Find + GO>Radio Button>Select
- Read **Note** written by patron e.g. Rush
- **Request Note**: system number and loan period (if book), Rush
- SEND

10. **Article and Book Chapter Scans (received via print form):**
Currently at: **Resource Sharing Library**
- **Actions**>Add>**From External Resource**>Find: In profile: ULI>GO>Radio Button>Select
- Fill in Requester ID from drop down
- **Delivery Location i**s automatically filled in as **Alternative Delivery** and **Requested Pickup Location** is automatically filled in as **Resource Sharing Library**
- **Requested Format=Digital** >SAVE+ EDIT add: author, title and/or pages of journal/book chapter
- **Maximum Fee**: Budget number/salary
- EDIT>Add ISSN/ISBN, author, title and/or pages of journal/book chapter>SAVE
- Check ULI/ULS for possible partners
- **Add Partners**>Choose partner>Choose one from list or Find + GO>Radio Button>Select
- **Request Note**: system number and loan period (if book)
- SEND

11. **Receiving scans:**
Currently at: **Resource Sharing Library**
- Save from email to Z:\ILL_OLD - crop/rotate as necessary. Do not print article.
- Find: External Request I.D. or title, or facets on left Status: **Request Sent to Partner**>**Digital**.
- If paid by cash **Send Query to Patron**>Arrival Letter - **Scan**>Check that status is now **Digitally received by Library**

- If paid by budget/salary **Send Query to Patron**>Arrival Letter – **Scan with Link**>copy + paste link from Forms and add 4 digits of order number .pdf
- **Receive**>**Automatically notify patron No**>Edit>Check cost to Patron is 15 nis, if from abroad change to 60 nis, if from Technion or TOC free change to 0 nis>GO
- Check **Maximum Fee** for Payment Method> If paid by budget or salary, send link to patron via Outlook and remove amount as detailed above for books.
- **Credit card payment:** after we receive notification by email enter **Manage Patron Services>Active Balance**>status ALL>Fine/Fee Type Resource Sharing Receive Fee>If no item barcode, send link by mail via **Send Query to Patron>**Arrival Letter – **Scan with Link**>copy + paste link from Forms and add 4 digits of order number .pdf. The file mail message in Done Current. Delete non-ILL mail messages with subject: **Library Payments Confirmation**

12. Checking Requests if patron phones/emails:
- Find: I.D. or name in Hebrew by **Requester**
- Activity status must be **ALL**

13. Claims:
- Choose Facet>**Request Sent to Partner**>Filter by **Update Date**>Send **General Message** to partner> Write REMINDER**>EDIT>SAVE** in order to change update date to today's date.

14. Proxy:
- If a patron enters a request using his/her i.d. or id of lecturer, must change the i.d. number to P + id in the borrowing request at the time of the loan.

15. Payment of Invoices
- **New Partner:**
  Enter catalog record: Enter existing catalog record>Edit Record>File>Duplicate>Edit details>Save
  Enter Vendor Code: Vendors>Add vendor
- Create PO Line in Repository Search>Find: **All titles**>Where: Local Call numbers>Contains: e.g. BGU Payments
- **Order**>Description: Ben Gurion University, Purchase Type: Other Service – One time, PO Line Owner: RS Library, Load from Template: Recently Used ILL-BGU, , Create PO Line – Confirm
- Material Supplier: e.g. ILL-BGU, change details to ILL-WIS etc.., List Price: 265, Fund: ILL payments 2546, Acq Method: Technical – **select, GO**.
- Write POL Line number on invoice e.g. POL-1003
- ACQ-Receiving and Invoicing, **Create Invoice**, Invoice Creation: Manually, Next, Invoice Number, Vendor (e.g. ILL-BGU), Total amount, Owner, Invoice Date, Payment Type e.g. Accounting Dept., Credit card – Save and Create Invoice Lines
- **Add Invoice Line**, PO Line , (Add Fund 2546 if new vendor), Add and Close, **Save**

16. Monthly invoices, budget/salary reports are run Analytics