Alma

Resource Sharing

Hands-On Activities

Borrowing Requests

(ARTEmail/Email)

Ex Libris Training Services

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Prerequisites for this Exercise

This exercise assumes Resource Sharing Configuration is in place

It is recommended to use this in your production environment during your implementation/testing phase with your own Fulfillment Configuration.

The following Configuration is accessible to Users with appropriate Roles but please consult with your project team as necessary.

Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Partners

Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Workflow Profiles

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Create a Borrowing RS Request (ARTEmail)

Goals of this exercise:

- Create a Borrowing Resource Sharing Request to send to the British Library
- In this exercise we are requesting a physical item for loan

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Patrons can place their own requests through Primo.

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1. Ensure your user has a "Fulfillment Services Operator" Role at the RS library

2. Start the exercise by being **currently at** the **Resource Sharing Library-Resource Sharing Desk.** This can be seen at the top center of the screen. If the display shows that you are **currently at** another location, please click on the location and change this to the **Resource Sharing Library-Resource Sharing Desk.**

3. Click the **Alma icon** at the top left to open the Alma menu, or press F2. Select *Borrowing Requests* under **Fulfillment**. The Resource Sharing Lending Requests Task screen displays.

4. Click on the **Add** button and Choose *Manually* from the **Add** options. Then choose the citation type *Book* and click **Choose**

5. The *Resource Sharing Borrowing Request* form displays on the *General Information* tab.

6. Enter at least **Title** information in the *Resource Information* upper part of the screen.

7. In the lower part of the screen complete the following details in the *Request Attribute*

   - *Requester* (enter Patron requester)
   - *Requested Format* (enter Physical)
   - *Needed by Date* (enter a date – optional)
   - *Pick up at Library* (enter a library where the patron will collect the RS item)
   - Check the *Agree to Copyright terms*

8. Now click **Add Partners** button at the bottom of this screen and select *BLDSC* (for British Library).

   Note the screen will refresh with additional attributes as you

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complete/select certain fields including the Partner.

9. Now (before clicking any further buttons), click on the second tab **Parameters** at the top of the screen.

> Check the **Service Codes** *BL Only Search*
> Choose a **Delivery format Code** from the drop down list (e.g. *Loan within 4 days*).
> Choose a **Customer Id** from the drop down list

10. Click the **Send** button on the right hand side. You will be returned to the Borrowing Request screen and a confirmation message displays at the top *Sent message successfully*

[The ARTEmail request has been sent to the partner]

1 ☐ **Prince Caspian**
Book By C S Lewis
External Identifier: TRAINING20000203
Partner: BLDSC

Requester: Cheesman, Debbie
Request Status: Request sent to partner
Edit | Duplicate | Send | Send query to patron | Receive | Reject | Locate Resource | Recalculate Rota Assignment

Note the External Identifier has been automatically populated and will go as part of the ARTEmail request. Make a note of this for the next part of the exercise. The Request status has also been populated.

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Receiving the Borrowing Request for a Physical Item

Goals of this exercise:	

Goals of this exercise:

- Receive a physical item from the British Library, loan to the patron and then return the item to the British Library

1. In this exercise, the item will be received by the Resource Sharing Library and transited to the Main Library for collection by the patron. Check that you are **currently at**: **Resource Sharing Library – Resource Sharing Desk.** This can be seen at the top center of the screen. If the display shows that you are **currently at** another location, click on the location and change to **Resource Sharing Library – Resource Sharing Desk.**

2. Open the Alma menu (F2) and choose **Receiving Items** from the Fulfillment submenu. The *Received Items* screen opens.

3. For the request you placed, check that the **Received Format** is *Physical.* In the **External Identifier** field enter the Id you noted earlier.

4. Click the **OK** button. A popup window will appear.

5. In **Please fill in temporary barcode** enter a barcode (e.g the numeric part of the id could be used). Select an **item policy** (to pick up configured policies), and/or enter a **Due date.**

	Title	Prince Caspian
External Identifier	TRAINING20000203
Please fill in temporary barcode *	0000203
Item policy	Interlibrary Loan
Location	Borrowing Resource Sharing Requests
Fulfillment note	
Due Date	04/22/2014

Note it is not necessary to change Location. The item will
be temporarily owned by the RS Library.

Make a note of the barcode for the next exercise.

6. Click **Save**

7. The item displays below with the destination of **Main
    Library** and Request/Process type *Borrowing Request*

Activated	Title	Destination	Request/Process Type	Requeste
✓	Prince Caspian	Main Library	Borrowing Request	Cheesma

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The item can be sent to the Pick up library for further
processing.

8. In the Resource Sharing Borrowing Requests screen, note
    the updated request status and Due Date

1 ☐ **Prince Caspian**
    Book By C S Lewis
External Identifier: TRAINING20000203
Partner: BLDSC
Requester: Cheesman, Debbie
Request Status: Physically received by library
Barcode: 0000203
Due date: 04/22/2014

An item requiring transit
to another library for
pickup will alert you to
this when it is returned.

Processing the Resource Sharing Request at the Pickup Library

Goals of this exercise:

- Circulation Desk receive the Resource Sharing Item
- Resource Sharing Item is picked up by the patron, loaned and returned by the patron

1. In the top-center of the screen, check that you are **currently at**: **Main Library – Main Library Circulation**. Click on the location to change it if needed.

2. From the Alma menu, choose **Scan in Items** from the Fulfillment submenu.

3. The Scan In Items screen displays. **Scan in/enter the temporary item barcode** that was recorded previously and click **OK**. [Note that it is also possible to Print Slip from the Scan In Items screen, and/or enter the Request ID instead of the item barcode.]

4. The item displays below with the destination of **On Hold Shelf**, meaning it can be placed on the hold shelf for pick-up by the patron.

Activated	Title	Destination	Request/Process Type	Requester
✓	Prince Caspian	On Hold Shelf	Patron physical item request	Cheesman, Debbie ✉ 🔳

[Note: At the time the item is scanned in step #3 above, a notification is sent to the Requester, indicating the item is on the Hold shelf awaiting pickup.]

5. In our example scenario, the patron picks up the item: Access **Manage Patron Services** from the **Alma menu** > **Fulfillment** submenu. Enter *the requestor name* from the presented list and click **Go**. Notice the message that **User has 1 item(s) waiting for pickup at this desk**.

6. Click the **Requests** tab to see the patron's requests. The **Actions** button gives the options to **Edit** or **Cancel** if necessary. Loan the item as you would normally do from the **Loans** tab > scan item barcode, and click **OK**. [Note the owning library is the Resource Sharing

Library]

7. In the Resource Sharing Borrowing Requests screen, note the updated request status

8. In our example scenario, the patron now returns the item: Access **Return Items** from the **Alma menu** > **Fulfillment** submenu and **Scan in/enter Item barcode**

    A popup displays indicating the items destination is the Resource Sharing Library

9. Click OK and the The item displays below with next step *Resource Sharing Library.*

    Circulation staff now send the item back to the Resource Sharing Library

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Processing and Completing the Borrowing Resource Sharing Request

Goals of this exercise:

- Once the item has been returned and sent to the RS library the Borrowing Request can be returned to the partner.

1. Now switch to the Resource Sharing Library to process the request and return to the *British Library*. To continue with the exercises check the **currently at** location at the top center of the screen. Click on the location and change to **Resource Sharing Library – Resource Sharing Desk**

2. From the Alma menu, choose **Scan in Items** from the Fulfillment submenu.

3. The Scan In Items screen displays. **Scan in/enter the item barcode** that was recorded previously and click **OK**. [Note that it is also possible to Print Slip from the Scan In Items screen, and/or enter the Request ID instead of the item barcode.]

4. The item displays below with the destination of **System – [Lending Partner- External ID]**

Activated	Title	Destination	Request/P
✓	Prince Caspian	System - BLDSC Request - TRAINING20000203	-

Click **Exit**

5. To see the status of the Request. Click the **Alma icon** at the top left to open the Alma menu, or press F2. Select *Borrowing Requests* under **Fulfillment**.

6. Examine the list of results.

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In this example the status is *Request Completed* (note this can be determined by configuring the borrowing workflow profile).

Create a Borrowing RS Request (Email)

Goals of this exercise:

- Create a Borrowing Resource Sharing Request to send to an Email Partner. In this exercise we are requesting a Digital format for document delivery.

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1. Ensure your user has a "Fulfillment Services Operator" Role at the RS library

2. Start the exercise by being **currently at** the **Resource Sharing Library-Resource Sharing Desk.** This can be seen at the top center of the screen. If the display shows that you are **currently at** another location, please click on the location and change this to the **Resource Sharing Library-Resource Sharing Desk.**

3. Click the **Alma icon** at the top left to open the Alma menu, or press F2. Select *Borrowing Requests* under **Fulfillment**. The Resource Sharing Lending Requests Task screen displays.

4. Click on the **Add** button and Choose *Manually* from the **Add** options. Then choose the citation type *Article* and click **Choose**

5. The *Resource Sharing Borrowing Request* form displays on the *General Information* tab.

6. Enter at least **Article\Chapter Title** information in the *Resource Information* upper part of the screen.

7. In the lower part of the screen complete the following details in the *Request Attribute*

   - *Requester* (enter Patron requester)
   - *Requested Format* (enter **Digital**)
   - *Needed by Date* (enter a date – optional)
   - *Pick up at Library* (enter *Resource Sharing Library*)
   - Check the *Agree to Copyright terms*

8. Now click **Add Partners** button at the bottom of this screen and select a partner with the profile type of **Email**

   Note the screen will refresh with additional attributes as you complete/select certain fields including the Partner.

9. Click the **Send** button on the right hand side. You will be returned

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to the Borrowing Request screen and a confirmation message displays at the top *Sent message successfully*

[The request has been e-mailed to the partner]

1 ☐   **How to create Resource Sharing Borrowing Requests**
      Article
External Identifier: TRAINING20000301
Partner: AB/C-1 University of Wales

Requester: Cheesman, Debbie [👤]
Request Status: Request sent to partner

Note the External Identifier has been automatically populated and will go as part of the email request. Make a note of this for the next part of the exercise. The Request status has also been populated.

Receiving the Borrowing Request for a Digital Item

Goals of this exercise:

- Receive a digital format from the email partner and complete the request

9. In this exercise, the item will be received by the Resource Sharing Library and emailed to the patron. Check that you are **currently at**: **Resource Sharing Library – Resource Sharing Desk.** This can be seen at the top center of the screen. If the display shows that you are **currently at** another location, click on the location and change to **Resource Sharing Library – Resource Sharing Desk.**

10. Open the Alma menu (F2) and choose **Receiving Items** from the Fulfillment submenu. The *Received Items* screen opens.

11. For the request you placed, check that the **Received Format** is *Digital.* In the **External Identifier** field enter the Id you noted earlier.

    Note as soon as you select *Digital* then you have the option to complete the request.

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12. Check the **Complete the request** box and click **OK**

The patrons details and email address are displayed below

The document can be emailed to the patron, and optionally attached to their patron record or the request itself.

13. In the Resource Sharing Borrowing Requests screen, note the Request Status is *Request Completed*

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