Alma

Resource Sharing

Hands-On Activities
Lending Resource
Sharing:Digital

Ex Libris Training Services

Table of Contents

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.

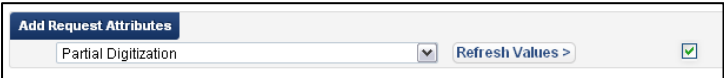**Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Partners**

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

Create a Lending RS Request

Goals of this exercise:	
• Create a Lending Resource Sharing Request for the Borrowing Library	

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 *Lending Requests* under **Fulfillment**. The Resource Sharing Lending Requests Task screen displays.

4. Click on the **Add** button and Choose *From Search* from the **Add** options. Then choose the index you would like to search in the **Where** field, noting the different indexes available to you in the drop-down. Finally, enter the word/term(s) to search into the **Contains** field.

   For this exercise, in the Where field choose *Title* as the index to search, and enter *Birds of the World* as the search terms in the Contains field. Then click the **Go** button.

5. Examine the list of results. Note that the results are per title with bibliographic information. Also note the sort options at the top and the availability of the Physical version.

6. Click the Radio button for record with the title *Birds of the World.* Click **Select** button at the top or bottom of the screen

   The *Resource Sharing Lending Request* form displays.

7. In the **Supplied To** Field select a Lending Partner.

8. Enter an **External Identifier**

9. Select Format **Digital** and complete other fields as necessary.

10. Click **Save.** Note the Request Status and the Resource Locate Status field.

11. Click the **Manage Fulfillment Options** link. You are taken to the *Manage Resource Options* screen

12. Click **Place Request** link. You are taken to the *Create Request* screen.

Note

Any circulation desk could be configured as a digitization Department

13. Click the **Request Type** field, select *Ship Digitally.*

   In the **Target Destination** field, select *Digitization Department For Institution* as the department/area that will process the digitization request.

14. In the **Request Attributes** section, select *Partial Digitization* by clicking the check box displayed on the right side and clicking the **Add Request Attribute** button.

15. An additional field **Part to Digitize** will display under the Requestor field. Enter a description of the parts to be digitized, e.g., Chapter 2, Pages 15-25.

16. Click on the **Submit** button to create the digitization request.

17. A confirmation message displays at top of the screen: *1 out of 1 requests were successful. 0 Due back dates were modified. 0 resource is already in the desired location.*At the bottom of the screen, the request displays with its ID. It is now being managed by the owning library of the physical item.

4

1 **Birds of the world /**
ID: 88150290000541   **Queue:** 1
Pickup Location: Digitization Department For Institution   **Request Date:** 03/18/2014
Call Number: QL673 .B44 2006
Managed By Library: Main Library   **Managed By Desk:** Main Library Circulation
Workflow Step: Pickup From Shelf   **Process Status:** New   **Process Date:** 03/18/2014   **Expiration Date:** 03/25/2014
Request Type: Ship digitally   **External Request Id:** 88150270000541
Note: Chapter 2, Pages 15-25.
View Audit Trail | Edit | Cancel | Update Expiry | Mark as Missing | Change to Electronic Digitization | Print Slip | View

(Note: Each request receives a unique request id.)

5

Process and Complete a Document Delivery Digitization Request

Goals of this exercise: • Process and complete a document delivery digitization (partial digitization) request

	1. In this exercise, the item will be retrieved from the shelf by Circulation Desk staff and transited to the Digitization department. Check that you are **currently at**: **Main Library – Main Library Circulation.** 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 **Main Library – Main Library Circulation.** 2. Click on the **Ex Libris icon** at the top-left of the screen to navigate to the Alma home page. 3. After digitization requests have been created, notifications will appear in the Tasks list for: • *Requests - pickup from shelf* • *Digitization requests - approval* From the Tasks list on the home page, click on **Requests - pickup from shelf.** (Alternate method: click **Pick from Shelf** from the Alma menu > Fulfillment.) 4. From the list, find the item to be digitized. Click on the **Print Slip** link to print a Resource Request Slip for the item. 5. As soon as the item has been picked up from the shelf, scan the item in. To do this, click on the Alma icon (F2) and choose **Scan In Items** under Fulfillment. 6. Enter the item barcode of the item that has been requested. In this exercise, the barcode is **14167635**. Click **OK**. Detailed information for the request displays, including the destination of the Digitization department for the institution and the Request Process Type *Ship digitally*. 7. Click on the **Actions** button and select **Print Slip**. A transit

6

letter for the item is printed, and the item can be sent to the Digitization department for further processing.
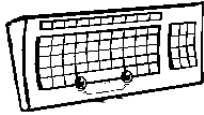
If the digitization rules preconfigured by an administrator determine that approval or Copyrights Clearance (CC) is required, you need to approve the digitization request.

The approval may be done at various stages in the process, but the user will not get an email regarding his completed request until it is approved.

8. The request also needs to be approved. Click on the **Alma** icon (F2) and choose **Approve Digitization Requests** under Fulfillment, or go to your Tasks list and select the entry from Digitization requests - approval.

9. The Approval Requests List page opens. For each item the following is displayed:

    o   Title
    o   Request Date
    o   Digitization type
    o   Status

    If the status is *Waiting for CC*, copyright clearance information needs to be entered. Click the *Work On* link beneath the item you want to approve. The Request Details page opens.

    If the status is *Waiting for Approval*, you don't need to enter Copyright information. In this case, click on the *View* link beneath the item you want to approve and click on the **Approve** button.

10. In our example, the status of the request is *Waiting for CC*. Therefore, click the *Work On* link.

11. On the following screen, enter copyright information for the digitization request.

12. Click the **Approve** button to approve the request. Note that you can reject the request by clicking the *Reject* link, or cancel the action by clicking on the *Cancel* link.

13. After the approval, the request disappears from the *Approval Requests List*.

14. Now switch to the Digitization department which will process the request. To continue with the exercises check the **currently at** location at the top center of the screen. Click on the location and change to **Digitization Department for Institution.**

15. Scan in the item so Alma knows the item is at the Digitization department. To do this, click on the Alma icon (F2) and choose **Scan In Items** under Fulfillment.

7

16. Scan the item barcode. In our example, the barcode is **14167635**. Note that bibliographic information and request information is displayed on the next screen.

17. Click on the link **Go To Manage Department Items** to see the digitization request displayed in the list. Then click on the **Actions** button displayed on the right side, and choose *Next Step*.

18. After clicking *Next Step,* click the **Actions** button again and select *Attach Documents*. (Note: The Attach Documents option only displays in the Actions menu after clicking Next Step.)

19. Click on the icon in the **filename** field to open a windows browser window to find the file, or add the URL information for it, and click **Add Attachment**.

20. After attaching the document, click the **Done** button. The Resource Sharing Library will receive an email indicating the request has been completed

> Your request to create a digital version of the following material has been completed.
>
> Material:
>
> Birds of the world /
>
> The request relates to external request idEXL9876 of AB/C-1 University of Wales.
>
> Request Type:Digitization

8

and the request is removed from the Items in Department list.

21. The item will automatically be sent back to the Circulation department in Alma.

22. Switch back to be **currently at: Main Library – Main Library Circulation**. This is done at the top center of the screen as before.

23. Scan in the item. Click on the Alma icon (F2) and choose **Scan In Items** under Fulfillment > Resource Requests.

24. Scan in the barcode of the item: **14167635**.

25. Notice the destination of **Reshelve**. The item can now be returned to the shelf. Note that you can print a slip if preferred by clicking on the **Actions** button and choosing *Print Slip*.

Sending and Completing the Lending Resource Sharing Request

Goals of this exercise: • Once the Digitization has taken place in the previous exercise the Lending Request Digitally Copy can be sent to the lender.	
	1. To continue with the exercises, check that you are **currently at** the **Resource Sharing Library – Resource Sharing Desk.** This is displayed at the top center of the screen. If you are **currently at** another location, click on the location and change to **Resource Sharing Library – Resource Sharing Desk.** 2. Click the **Alma icon** at the top left to open the Alma menu, or press F2. Select *Lending Requests* under **Fulfillment**. The Resource Sharing Lending Requests Task screen displays. 3. Examine the list of results. Note that the request now indicates the Request Status as "Shipped Digitally".

9