Alma Resource Sharing – Borrowing Workflow

1. Book Loans (received via Primo):

Currently at: **CIRC_DESK**

Unassigned and the Activity Status is **Active**

Tasks >**Borrowing Requests - New - with No Partner //** Facets **>> Created Borrowing Request**

Select **EDIT** to show the full details of the request

Requested Format: Physical

Requested Pickup Location is automatically filled in the **Open University of Israel Library**

Check **Request media** >> Book

Check ULI> copy **system number** of the chosen partner

Add Partners>Choose partner> Choose one from list or Find + GO> >**SELECT**

Request Note: Paste **system number** > SEND

*Request sent to Partner and copy sent to: ILL-FOLLOW-UP.

Check that status is now**: Request Sent to Partner**

Receiving books from Lender:

Currently at: **CIRC_DESK**

 Request Sent to Partner > **Physical**.

[… More actions] **Receive**> automatically print slip**: YES** >> automatically notify patron**: NO**> Received format**: Physical> Barcodes**. - Fills in automatically > > fill in **Due Date >>** Barcode>**OK**

Print arrival slip from Outlook>Alma Print, place in book.

Check that status is now **physically received by Library**

Send Query to Patron>Arrival Letter (Book)→ FILL in bcc: ILL-FOLLOW-UP address

Take the book to the Circulation Desk.

==Loaning and returning the book will take place at the Circulation Desk==

- When the Patron loans the book from Circ. Desk → the request status changes to : **Loaned item to Patron**
- When the Patron returns the book to Circ. Desk → pop-up appears – X partner request no. _____ and the request status changes to **: Request completed**

Returning the Book to the Lender:

- If the return takes place at the Circ. Desk:

Request Status: Request completed

Find the return slip **Resource Sharing Return Slip Letter** at Outlook ALMA PRINT, print it and place it in the book **OR**: find the original slip on RS table, stamp it: "מוחזר בתודה" and place it in the book.

Send the book by ORIAN or surface mail

- If the book isn't returned at Circ. Desk

Request Status: Loaned item to partner

[… More actions] **Return>>** automatically print slip >> **YES**

Print **Resource Sharing Return Slip Letter** from Outlook ALMA PRINT, **OR**: find the original slip on RS table, stamp it: "מוחזר בתודה" and place it in the book.

Check that the status is now >> **Request Completed**

2. Article and Book Chapter Scans (received via Primo):

Currently at: **CIRC_DESK**

Tasks>**New Borrowing Requests with No Partner //** Facets **>> Created Borrowing Request**

 EDIT to show the full details of the request. Check: author, title and/or pages of journal/book chapter

Requested Format=**Digital,** Delivery Location=**Deliver to Library**>

Pickup Location is automatically filled in the **Open University of Israel Library**

Check **Request media** >> Article // Photocopy of part

Check ULI/ULS for possible partners

Add Partners>Choose partner> GO

Request Note: system number, Rush >> **SEND**

*Request sent to Partner and copy sent to: ILL-FOLLOW-UP.

Receiving scans:

CHECK ARTICLE

Save from email to   S:_GROUP\Library\ill_files\prod\borrowing.

`RUN:OCTOPUS`

Facets > **Request Sent to Partner**>**Digital**.

[… More actions] >> **Send query to Patron**> Arrival Letter (Article) // Arrival Letter (Photocopy of part). FILL in bcc: ILL-FOLLOW-UP address. And add the LINK from OCTOPUS.

Mail sent to patron and copy sent to: ILL-FOLLOW-UP

Change manually request status: **Request Completed**

Replies:

Cancelled by Partner > Send **Query to Patron** (More information) > Not for Loan/Lost etc... **OR** **Change partner.**

Cancelled by Patron> **Request Sent to Partner** > **Cancel**>
> Status will change to **Cancelled by Patron or Cancelled by Staff**

USE: General Message: to send a letter to partner

USE: Query to Patron: to send a letter to Patron

Rota Tab: to remove irrelevant partners>Choose **Cancel** or **Remove**

Change Partners

Add Partner
Rota Tab > [more action] of irrelevant partner – **Reject**
The new partner will change from pending to **Active** >> **send**