

Questions posed by Lynne Porat

March 24 2017

Using Funds with Borrowing Resource Sharing Requests

Hi Moshe, Could you please post details of the main issues discussed at your meeting on "Using funds with Borrowing Resource Sharing Requests" on 15.3.17? Thanks, Lynne

August 31 2016

RS Borrowing Letters - External Identifier

Hi Shmuel, Is it possible to remove the prefix 972HAIMAIN0000371 and just leave 0000371 as the number is displayed incorrectly in the Hebrew letters: HAIMAIN0000371972? Thanks, Lynne

August 24 2016

RS Lending - Place Request

Hi Shmuel, Do you know why Alma chooses item policy #41 Not for Loan as the default when we place a request for a thesis that has several copies, and not #40 14 Day Loan or #90 Storage? #41 is defined in the library's TOU as Non Requestable. Thanks, Lynne

August 16 2016

Deleting inactive Digitization Requests

Hi Shmuel, Pls. explain how to delete inactive requests in Digitization Dept. for Institution - Manage in Process Items. We cannot remove the last three items in the following screenshot even though one was supplied and the other two were rejected. Thanks, Lynne

RS Lending - Analytics

Hi Shmuel, What are the repercussions of changing all Shipped Digitally requests to Completed? Will they still be included in Analytics reports for invoicing purposes? Thanks, Lynne

RS Borrowing - Patron Costs

Hi Shmuel, What is the difference between Patron Request Cost and Patron Receive Cost? I noticed that if both are filled in the patron gets charged twice. Thanks, Lynne

July 18 2016

Resource Sharing Lending Reject Letters

Hi Shmuel, When we press Reject within the request to send a RS Lending reject letter (to a non-ISO/Alma partner) the message is not sent by email; and the status is not updated to Rejected Borrower Request. However, when we manually update the status to Rejected Borrower Request, it is updated, but the message is not sent by email. How can we configure this? Also, how can we send general messages without rejecting the request such as "item is on loan, will you wait?" Thanks, Lynne

July 13 2016

Resource Sharing Borrowing Reject Letters

Hi Shmuel, When we send Reject letters from the RS drop down menu such as Lost, Non-Circulating etc... the same Cancellation Letter is sent even though we choose different reasons. It seems to be sending **Ful Cancel Request Letter** which is a standard cancellation letter from Circulation, instead of **Ful Cancel Email Letter** which is the RS letter. Please explain how to get the correct RS reject letters for each reason we choose. Thanks, Lynne

July 7 2016

RS Lending Multi-Volume Items

Hi Shmuel, The problem seems to be that we have to do the following: Add Request Attributes - Destination Locations - Lending Resource Sharing Requests. Is it possible to configure so that this attribute is auto filled for ALL Lending requests? If this is not connected to the original problem, we will open a case as we are still receiving the above error. Thanks, Lynne

July 5 2016

RS: Borrowing - Patron Query Templates

Hi Shmuel, We want to use a Patron Query Template to send URLs of digitized items to our patrons, however, the action is not noted in the Audit tab (and neither is the Patron Cost although the latter does appear in the Fines and Fees Details). Is there a solution to this in Alma or only in the Sent Items of our email? Thanks, Lynne

RS: Borrowing - Check out to patron

Hi, Can you pls. explain how to get to Check out to patron as I cannot see it once I receive a digital item? The manual states: "Select Complete the request when you have completed the request to mark it as closed. If you do not select this option, the resource's status is listed in the Resource Sharing Borrowing Requests list as Digitally received by library. To check the item out to a patron and complete the request, select Check out to patron. The request status changes to Request Completed, and an entry is added to the Audit tab, indicating the status change and that the item was checked out to a patron". Thanks, Lynne

Fulfillment: User Details RS Library

Hi Shmuel, Can we leave the "Resource sharing library" field empty on the User Details page? The help screen states "When no value appears in this field, the default library specified in the ill_item_creation_lib_code value is used." (see screenshot). Thanks, Lynne

RS Lending - drop down of format types & attributes

Good Morning, We would like for ALL RS requests with Format: Digital and Request Type: Ship Digitally to use the Document Delivery workflow, regardless of whether the Partial Digitization Attribute has been added to the request. Perhaps we could configure the Full Digitization Attribute to also use the Document Delivery workflow? Thanks, Lynne

June 21 2016

RS Lending - drop down of format types & attributes

Hi Shmuel, How can we change the drop-down so that only two format types are displayed: Digital and Physical, but not Physical non-returnable (see screenshot)? Also, once we have chosen "Ship Digitally" under Manage Fulfillment Options, can the Partial Digitization attribute be added automatically (see screenshot)? Thanks, Lynne

June 15 2016

RS Lending Multi-Volume Items

Hi, The reason I ask is because I encountered the same problem as described here. https://knowledge.exlibrisgroup.com/Alma/Knowledge_Articles/Error_messages_when_scheduling_in_an_item_to_fulfill_a_resource_sharing_lending_request. Lynne

RS Lending Shipping Digital Items - Auto Complete

Hi Shmuel, It is still not clear to me if we can configure all digital requests to be "completed" automatically after shipping. Pls. advise. Thanks, Lynne

June 14 2016

RS Lending Multi-Volume Items

Here is the screenshot of the Location field I was referring to. Can you please explain its purpose? Thanks.

June 7 2016

Automatic Renewals of RS Borrowing Items

Hi Shmuel, I am not sure I understood what you said at the workshop about configuring the six-week loan period for RS borrowing items. Are we able to limit the automatic renewal to six weeks or is it better to loan an item in advance for six weeks? For both options, pls. send the configuration details. Also, how do you suggest we charge a one-time renewal fee of 12 nis for another six week loan? Thanks, Lynne

RS Lending Multi-Volume Items

If we create one request and ship it, could we then lend the other volumes via Scan in Items? It is better for us not to create new requests as we don't want to inadvertently charge for the extra volumes. Also, I notice that Locate is mandatory even though it is not marked as a mandatory field. Lynne

RS Lending Multi-Volume Items

Hi Shmuel, How can we ship several volumes of a multi-volume title to a requesting library? Thanks, Lynne

June 2 2016

Address Type "Claim" in Partner Details

Hi, I am attaching details of the Not Received status in OCLC, organized by: Category, Description and Borrower Action(s). If this feature doesn't exist in Alma, does the status remain Sent to Partner indefinitely? Thanks, Lynne

May 29 2016

History of Resource Sharing Requests in Primo

Hi Shmuel, Is there a history of a patron's RS requests, including digital items, in Primo?

Thanks, Lynne

RS Lending Shipping Digital Items - Auto Complete

Hi Shmuel, Do you have a response to this? Thanks, Lynne

May 25 2016

Analytics Filter Percentage Fill Rate

Hi Shmuel, I have found a partial solution to this in Analytics, but if possible, I would still like to hear what you would recommend. Thanks, Lynne

Address Type "Claim" in Partner Details

Hi Shmuel, Do you have a response to this pls? Thanks, Lynne

Editing List of partners in Shipping Cost Lender Rule

Has the issue been raised on Ideas Exchange and/or NERS, or shall I do so?

RS Borrowing Status: "Received - Not for Loan, Not Enough Time"

Thank you. I just came across this Q&A from 2014 about status "Item Cannot be Loaned to Patron - Insufficient Due Date" which has solution of configuring the Opening Hours. Is it the same issue? Lynne

Editing List of partners in Shipping Cost Lender Rule

Hi Shmuel, How can we Edit the list of partners in a Shipping Cost Lender Rule (and not just delete the entire input parameter)? Thanks, Lynne

List of Borrowing requests by Partner Code

Hi Shmuel, We plan to skip steps 4 and 5 (as our Circulation staff bring the books directly to the ILL office) and use the "Ship Item" option. If it is not possible to search our Created Lending Requests by System Number or Barcode, we will search by Title/Author or ISBN. Lynne

May 18 2016

Item Policy drop down when receiving a Resource Sharing item

Hi, Can you pls. create a Temporary Item Creation Rule for us as we still do not have access to this configuration option? Fulfillment Configuration > You are configuring Resource Sharing Library > Library > Temporary Item Creation Rules > Add Rule Input Parameter: Circulation Desk = Resource Sharing Desk Output Parameter: Location = Borrowing Resource Sharing Requests Item Policy = Interlibrary-Loan Category: Fulfillment - Alma Subject: Configuration - Alma Thanks, Lynne

May 17 2016

RS Lending Shipping Digital Items - Auto Complete

Hi, Is it possible for the status of an item that was "Shipped Digitally" to automatically become "Request Completed" and disappear from the Active requests list? At the moment we need to mark "Complete the Request" manually (see screenshot). If it is not possible to configure this, how can we change the status to "Request Completed" manually after an item was shipped as this doesn't seem to work when we use the drop down list of statuses? Thanks, Lynne

RS Lending: Shipping Slip Due Date

Hello Shmuel, Is it possible to add the Due Date to the RS Lending Shipping Slip? My colleagues in Aberystwyth were not able to find a way to do this so they write the date manually once they have printed the slip. Thank you, Lynne

RS Borrowing Status: "Received - Not for Loan, Not Enough Time"

Hi Shmuel, When we were Receiving a RS Borrowing request we got the following status "Received - Not for Loan, Not Enough Time" - is this because of the patron's Need By Date or because of the Due Date determined by the supplying partner? Either way, we couldn't find a way to change the status to "Physically received by library" so we could briefly loan it the patron. Thanks, Lynne

May 16 2016

List of Borrowing requests by Partner Code

Hi Shmuel, We receive requested Lending items from the Pickup Shelf without slips, and therefore the easiest way to identify the correct RS record is by System Number (or preferably barcode, but this is not possible as it only appears on the record once the item has been loaned). Perhaps this is the case with the system number too? Lynne

List of Borrowing requests by Partner Code

Hi Shmuel, Regarding the facets in Borrowing - that's fine. Regarding Lending, here is a screenshot of the Haifa system number I am referring to. Thanks, Lynne

Borrowing External Resource Search

We don't have this option in RS - we only have a basic keyword search. Do you have another solution as we need to know that the keyword search is reliable and is not dependent on the order of the words we type? Thanks.

Resource Sharing TOU

As our meeting has now been postponed till 5.6., I should be grateful if you could try to explain via Basecamp. Thanks, Lynne

List of Borrowing Requests by Partner Code

Hi Shmuel, I don't mean filtering by the Active Partner Facet once we have performed a search, I mean using the drop down Find menu in RS Borrowing (see screenshot). Similarly, I would like to add the option of searching by System Number to the drop down menu in RS Lending. Thanks, Lynne

Borrowing External Resource Search

That would be great, but if you remember, we already inquired about an Advanced Search and were told that it is not possible. Is this something that can be configured? I am attaching a screenshot so you can see what we see when we search via RS Borrowing. Thanks, Lynne

Maximum Cost

Yes, I saw several other welcome things in the Road Map such as **Integrated Billing**. Thanks, Lynne

May 13 2016

Analytics Filter Percentage Fill Rate

Hi, How can we calculate Percentage fill rate and Average Delivery time for Borrowing and Lending in Analytics? Thanks, Lynne

Will My Sets (Saved Queries) in the Advanced Repository Search be migrated?

Hi, Will My Sets (Saved Queries) in the Advanced Repository Search be migrated after we go live - e.g. overdue items and non-received items? Will all my analyses and reports be saved? Thanks, Lynne

List of Borrowing requests by Partner Code

Hi Shmuel, Is it possible to create a list of Borrowing Requests by Partner Code only? I realize this is possible via Analytics, but we need this to be up to date at the time of performing the search. Thanks, Lynne

Borrowing External Resource Search

Hi Shmuel, Why do I get a different set of results when I search keywords in ULI? E.g. If I search "Porat Lynne", I get 13 results, if I search "Lynne Porat", I get 1 result. Thanks, Lynne

Borrowing Receipt Slip

Hi Shmuel, Can we automatically print a **Receive Slip** when we notify a patron of the arrival of an item or do we have to "Scan it In" after we receive it? Thanks, Lynne

Address Type "Claim" in Partner Details

Hi Shmuel, If we mark the Address Type "Claim" in the Partner Address Details will reminders be sent automatically to our patrons by email? If we are using ISO, is there a status "Not Received" like in OCLC? Thanks, Lynne

May 11 2016

Maximum Cost

Yes, I mean the Maximum Fee, The Note that is retrievable via Analytics seems to be the Request Note and not the Notes tab. The Request Note will be used for adding the system number of the requested item and loan period which is information that is useful to our partners. I hope there is a way to retrieve information from the Notes tab as this would be an ideal solution. Thanks

Shipping Cost Lender Rules

I think about 200 was ok (we got the error when we tried to add about 350), but I have now deleted many old partners and divided the active ones into price categories so there shouldn't be a problem.

Shipping Cost Lender Rules

"Partner is Not Empty" only allows us to add one partner, whereas we need to add about 30 partners to each category (10 different categories) - so pls. let us know when this bug is fixed.

Disabling Lending Auto Assign

Hi Shmuel, I tried disabling "Lending auto assign" in the Sandbox, but it is not possible (Fulfillment Configuration menu (Fulfillment > Fulfillment Configuration > General > Other Settings > "rs_disable_lending_auto_assign">'true'). Can you pls. configure it in the Sandbox and Prod.? Thanks, Lynne

Shipping Cost Lender Rules

Hi Shmuel, Is there an upper limit to the number of partners that can be added to a shipping rule via Select All - as we encountered an error? Thanks, Lynne

Resource Sharing TOU

I configured two different amounts of Cost to Patron on the Sandbox (via Fulfillment Configuration>TOU>Resource Sharing Fee, but it is not clear to me if we can configure two fees one for digital and one for physical so that each one will be entered automatically based on the shipping format. Pls. let me know.

Pick From Shelf

Hi Lili, How long are items on Pick From Shelf List before they are automatically cancelled? Where can we define this period? Thanks, Lynne

RS Partner Addresses

Hi Lili/Shmuel, The full addresses of Resource Sharing partners were not migrated to Alma (see screenshot). We need these addresses for invoicing and shipment purposes. Thanks, Lynne

May 5 2016

Rejected Borrowing Request - Workflow

Yes I am, but doesn't this assume that the "locate" profile is defined for all our partners? The scenario I am describing assumes that we have searched for an item in ULI and are adding a partner manually (which is how we will work until we have ISO/Alma partners and locate profiles defined). Thank you.

Maximum Cost

Hi Shmuel, We have created an Analysis of borrowing requests that need to be paid for using research budgets. The only available field on the Borrowing request to register the patron's budget number is the Maximum Cost field. (The Patron Note field is used for free text entered via Primo). Is there any reason NOT to use the maximum cost field as we have flat rates, so this will not be a mandatory field on the Primo ILL request form?

Thanks, Lynne

Rejected Borrowing Request - Workflow

As you know, all of our partners are non-ISO and non-Alma partners (except for one). When we add a partner to a request, can we register all the other possible partners in advance? And if the first choice partner rejects our request, can we add another partner to the same request or do we need to "reject" it and then duplicate it? Or is there some way to relocate the item and begin the process over again? Thanks

Resource Sharing TOU

In that case, we may not be looking in the right place. When we receive a Borrowing item, there is a Shipping Cost (which we configured) and a Cost to Patron - where can we configure this amount? Thanks, Lynne

Shipping Cost Lender Rules

Thank you. We decided to choose the Operator: InList and the Value: Select All partners - which seems to have solved the problem for us. Is there a limit to the number of partners we can add to each shipping cost rule? Lynne

Resource Sharing TOU

Hi, Can you pls. configure the resource sharing TOUs so both lending and borrowing are enabled, and also so the cost is 12 nis for physical, 20 nis for digital? as we have no access to this configuration menu. Thanks, Lynne

May 3 2016

Shipping Cost Lender Rules

So does that mean we need to define hundreds of rules? i.e. each partner will need several rules based on level of service and material format? Is it possible to define more than one parameter (partner/level of service) in a rule? i.e. "Contains" BAR or BGU or JMS etc.. and "Contains" Normal or When Convenient or Rush etc... At what stage in the process is the cost automatically filled in? I configured some rules in the Sandbox, but the costs don't seem to be entered into the records at the record creation stage or at the shipping stage. If prefer, we can talk about this at the session next week. Thanks, Lynne

Shipping Cost Lender Rules

Hi Shmuel, We have 10 different Shipping Cost Lender Rules: Universities: digital and physical, Hospitals: digital and physical, Northern Forum: digital & physical, Other Libraries: digital & physical, Technion: digital & physical. How do we choose the relevant rule at the time of shipping (should we see a drop-down menu)? Can this be configured so that it is done automatically? Thanks, Lynne

April 20 2016

Sending digital Borrowing and Lending RS Requests

Actually, I sent the message by email to you only. Hag Sameach. Lynne

Sending digital Borrowing and Lending RS Requests

Hi Shmuel, We found the answer to this question (once we defined our Digitization Dept.). Thank you. Lynne

April 14 2016

Resource Sharing Invoices

Hi Shmuel, I have created a Lending Invoices analysis which I plan to run once a month, however, I cannot find a way of indicating that invoices have been issued, so that the next time I run the analysis these items will not appear. Do you have any suggestions? At least until Integrated Billing is supported by Alma. Thanks, Lynne

Sending digital Borrowing and Lending RS Requests

Thanks. And one more thing, is the Partner's email address saved, or do we need to enter it into every Lending request?

April 12 2016

Sending digital Borrowing and Lending RS Requests

Thank you for the clarification. As we don't send attachments (we use our own web server), can I assume that if we choose to "attach" a URL address to the Notification Letter (both to our patrons and Borrowing Partners), it will be appended to the message? Thanks, Lynne

April 10 2016

Sending digital Borrowing and Lending RS Requests

Hi Shmuel, In the Alma Hands-On Activities, it states that once an item has been digitized, it can be sent to the patron/lender. Does that mean that we have to send a separate email with a link/attachment? If not, pls. explain the workflow. Thanks, Lynne

Resource Sharing Follow-up from session on 3.4.16

Thank you Shmuel, I didn't get the original email. Regarding Number 3 - I realize that we can configure automatic locate, but it is still not clear to me whether the hold request is actually placed automatically in our system once the item has been located. Thanks Lynne

Resource Sharing Follow-up from session on 3.4.16

Hi Shmuel, Can you pls. give us your responses to the following issues that were raised at the session on 3.4.16? 1. How do we define Borrowing Patron Note so that it doesn't appear on email letter to partner? 2. How do we define Open URL for AutoFill of ILL form on Primo? 3. How do we define automatic Locate + Place Request for Lending? Thanks, Lynne

March 30 2016

Resource Sharing Invoices

Hi Shmuel, I checked in the Analytics Guide and I couldn't find an explanation - it states: Lending Requests Using the Lending Requests area, the Design Analytics user may create reports/dashboards for the lending requests area and is able to answer the following types of business questions: 1. Which partners where requested? 2. Lending Request counts 3. Which type of users issue the requests 4. Time statistics between request and sent Can you pls. direct me to the relevant areas in Analytics? Thanks, Lynne

February 28 2016

Resource Sharing Partners

Would it be possible to DeDup so that that we only have one partner record for Borrowing and Lending?

Resource Sharing Partners

Shalom, After the test load, the list of partners in Borrowing consists of 457 partners, many of which are Lending partners. However, in Lending the list of partners consists of a small number of partners, all of which are Borrowing partners. Pls. let us know how to solve this. Thanks, Lynne

February 15 2016

Resource Sharing Invoices

Hi Shmuel, How do we create a file of resource sharing invoices for other libraries? Is it possible via Fees/Fines-Active balance? Thanks, Lynne

Responses from Shmuel Moss:

September 1 2016

RS Borrowing Letters - External Identifier

Hi Lynne, Please open a case with a scenario/screenshot and we will be happy to investigate. Perhaps the solution is to get the identifier to display properly? Or do you want to remove the prefix in any case? Please indicate your desired outcome in the case. Thanks. Best Regards, Shmuel

August 24 2016

RS Lending - Place Request

Hi Lynne, Please open a case with details of the scenario and we will investigate. Thanks. Shmuel

August 16 2016

Deleting Inactive Digitization Requests

Hi Lynne, Never mind. I found it. Apologies for the confusion. Please open a case for this matter and we will investigate. Thanks. Shmuel

Deleting Inactive Digitization Requests

Hi Lynne, What is your "Currently At" location (Digitization Department For ...)? Thanks. Shmuel

RS Lending - Analytics

Hi Lynne, Changing a request to Completed (e.g. Shipped Digitally) does not delete the request or remove it from Analytics. By default, Completed requests are not displayed in the list of Resource Sharing requests in Alma. However, you can view them by changing the Activity Status filter (upper left corner) to "All" or "Completed". Best Regards, Shmuel

RS Borrowing - patron costs

Hi Lynne, The Patron Request Cost is/can be assessed at the time the borrowing request is created. The Patron Receive Cost is/can be assessed at the time the requested material is received at the library. These fees can be assessed 'automatically' according to the new (July 2016) policies in the Borrowing TOU: Resource Sharing Request Fee and Resource Sharing Receive Fee. These fees can also be assessed/overridden in the Borrowing Request form itself. Best Regards, Shmuel

July 17 2016

Resource Sharing Lending Reject Letters

Hi Lynne, Concerning the change in status, I have not been able to reproduce this. When I click 'Reject' under a Lending Request, the status of the request status is updated to "Rejected the borrower request". If you are still experiencing this issue, please open a case with a step-by-step scenario for reproducing this. Concerning the fact that no email is sent to the partner (e.g. for Email partners), this appears to be a bug. Please open a case for this. Thanks. Concerning general correspondence with partners, this is currently supported for partners of type ISO. Support for Email partners is currently planned for the end of this year. Best Regards, Shmuel.

July 13 2016

Resource Sharing Borrowing Reject Letters

Hi Lynne, We will be happy to investigate this. Please open a case with details for reproducing the scenario. Thanks. Best Regards, Shmuel

July 6 2016

RS Lending Multi-Volume Items

Hi Lynne, If no Location is selected in the Lending request AND no default lending location has been configured in the Resource Sharing Library, then you will get this error. We previously configured a default lending location for your Resource Sharing Library, so I would expect that you would no longer receive this error. If you are still seeing this error, please open a case with details of the step-by-step scenario for re-producing this error. Thanks. Best Regards, Shmuel

July 5 2016

RS: Borrowing - Patron Query Templates

Hi Lynne, Queries sent to patrons as part of a Borrowing Request are not recorded in the Audit tab of the Borrowing Request. Note that Alma can be configured to save the queries in the Attachment tab of the Borrowing Request and in the Attachment tab of the user record (Fulfillment Configuration Menu > Other Settings > send_query_to_patron_use_xsl=true. Currently your Alma production environment has send_query_to_patron_use_xsl=false). Note that when this parameter is true, you can select which query template to send the patron (if you have configured any templates), however you cannot edit the notification before it is sent. In other words, clicking "Send query to patron" will not show a pop-up of an editable notification/query, unlike when send_query_to_patron_use_xsl=false. Best Regards, Shmuel

June 23 2016

RS: Borrowing - Check out to patron

Hi Lynne, This is an error in the documentation, which should be fixed by next week. Thanks for catching this and apologies for the confusion it caused. Best Regards, Shmuel

RS Lending Multi-Volume Items

Hi Lynne, Yes, you could please open a case with a step-by-step scenario for re-producing the issue? Thanks. Shmuel

RS Lending Multi-Volume Items

Hi Lynne, If no Location is selected in the Lending request AND no default lending location has been configured in the Resource Sharing Library, then you will get this error. We previously configured a default lending location for your Resource Sharing Library, so I would expect that you would no longer receive this error. If you are still seeing this error, please open a case with details of the step-by-step scenario for re-producing this error. Thanks. Best Regards, Shmuel

June 22 2016

Fulfillment: User Details RS Library

Hi Lynne, Yes, you may leave this field empty in the user record. You have only a single Resource Sharing Library, which is already configured as the ill_item_creation_lib_code. Best Regards, Shmuel

RS Lending - drop down of format types & attributes

Hi Lynne, Thanks for this clarification. We can configure a Digital Profile Rule based on Request Type = lending resource sharing digitization request with Output = Document Delivery. If this would serve your purposes, please update case 00227690 and we will be happy to make the necessary modifications. Thanks. Best Regards, Shmuel

June 21 2016

RS Lending - drop down of format types & attributes

Concerning the Digitization Profile Rules? What would you like to achieve?

RS Lending - drop down of format types & attributes

Hi Lynne, The format options are not configurable. The Partial Digitization request attribute can be added manually only. It may be possible, depending on your needs, to configure the Digitization Profile Rules to use the Document Delivery workflow, regardless of whether the Partial Digitization request attribute has been added to the request. Best Regards, Shmuel

June 16 2016

Automatic Renewals of RS Borrowing Items

Hi Lynne, I do not remember all of the details of your workflow. In general, you can charge a renewal fee, but this will be applied each time the loan is renewed. You can configure a loan - for whatever due date - to be renewable or not, via the Is Renewable policy of the applicable Loan TOU. You can also configure the total duration of the loan (i.e. original loan + any renewals) via the Maximum Renewal Period policy of the applicable Loan TOU. Alma, unlike Aleph, does not limit renewal to a specific number of times the loan can be renewed rather, if the loan is renewable, the total maximum length of the loan. If you need more specific guidance about configuration options and considerations, please remind me of the specific scenario(s). Thanks. Shmuel.

June 15 2016

RS Lending Shipping Digital Items - Auto Complete

Hi Lynne, For Lending Requests fulfilled digitally, Request Status="Shipped Digitally" is the end of the request process, i.e. the final status. (cf. [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_\(English\)/Fulfillment/050Resource_Sharing/030Managing_Resource_Sharing_Lending_Requests](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Fulfillment/050Resource_Sharing/030Managing_Resource_Sharing_Lending_Requests)). In order to remove the completed request from the list of Active Lending Requests, the Request Status must be updated to 'Request Completed'. In the case of requests shipped digitally, this is not done automatically. Best Regards, Shmuel.

RS Lending Multi-Volume Items

Hi Lynne, Thanks for this clarification. The Location field in the Shipping Items screen allows you to define the temporary location of the item that is to be shipped. Upon return of the lent item, the selected location will display as the temporary location of the item. The Location field is not a mandatory field in this screen. If you leave this field empty, the resource sharing library's Lending Default Location will be used as the temporary location. Best Regards, Shmuel

June 14 2016

RS Lending Multi-Volume Items

Hi Lynne, If the title/item has not been associated with the request, scanning it at the circ desk (=Scan in Items) would indicate the 'next step' (e.g. Transit for reshelving). Concerning the Locate field, can you please clarify what you are referring to? Thanks. Best Regards, Shmuel

Address Type "Claim" in Partner Details

Hi Lynne, Thanks for this clarification. There is no comparable workflow step/status in Alma, however you can update the request status to Request Accepted or Will Supply (if you have received such information from the Lending Partner). You can also contact the partner and add a note to the request. Best Regards, Shmuel

RS Lending Multi-Volume Items

Hi Lynne, Lender shipping of multiple items is planned for a future release. Currently, assuming each volume has its own unique barcode - as opposed to a multi-part item with a single barcode - you would need to handle each volume as a separate request. Best Regards, Shmuel

June 2 2016

History of Resource Sharing Requests in Primo

Hi Lynne, The only record of requests - in Alma and in Primo - is current requests, including Resource Sharing requests. Once the request has been fulfilled or cancelled, it is removed from the patron's record. You may be able to get this information in Analytics (you would need to check this to be certain). Best Regards, Shmuel

Analytics Filter Percentage Fill Rate

Hi Lynne, The only solution here - partial or full - is in Analytics. There is no support in the Alma interface for this kind of statistical analysis. You might want to consider posting to ALMA-L for assistance on creating a more satisfactory report. Best Regards, Shmuel

Address Type "Claim" in Partner Details

Hi Lynne, The 'Claims' address type is relevant for Vendors. It is not functional for Resource Sharing (partners or patrons). Concerning 'Not Received' for ISO partners, I am not familiar with this functionality in OCLC. Please explain what the 'Not Received' status is meant to convey. Thanks. Best Regards, Shmuel

RS Lending: Shipping Slip Due Date

Hi Lynne, Yes, I believe this should be possible. The Lending slip notification can be customized via Administration > General Configuration Menu >Customize Letters > Lending Requests Report Slip Letter. Add the following: <xsl:value-of select="notification_data/request/due_date"/> Best Regards, Shmuel

Editing List of partners in Shipping Cost Lender Rule

Hi Lynne, Unfortunately, you have to delete the entire input parameter. This has been a sore point with Alma implementation customers since the very beginning. I think that most customers forget about this after they go live, since it is fairly rare that rules need to be modified. Best Regards, Shmuel

RS Borrowing Status: "Received - Not for Loan, Not Enough Time"

Hi Lynne, The absence of opening hours in the Resource Sharing library could certainly prevent an item from being loaned, although I do not know if this was the entire explanation in the example you described. In any case, you do need to configure opening hours for your Resource Sharing Library as currently there are none. You can do this yourselves (you do have access to this during implementation). If you prefer that we do it for you, please open a case with the RS Library opening days and hours. Best Regards, Shmuel

RS Borrowing Status: "Received - Not for Loan, Not Enough Time"

Hi Lynne, The patron's 'Needed By' date is consulted when determining which partner can fill the request. Once the item has been received by the requesting library, the 'Needed By' date is no longer relevant. Without investigating the specific example, it sounds like the latter, that the Due Date defined in the applicable TOU, the 'Delivery Delay' defined for the Partner (if any) and the loan date were such that the item could not be loaned. Changing the status of the request (e.g. 'Physically received by library') would not override the restriction that arises because of these configurations. However, in such a case, you should be able to override the due date of the TOU by entering an explicit due date in the Borrowing Request. Best Regards, Shmuel

List of Borrowing requests by Partner Code

Hi Lynne, The typical workflow for Lending Requests after the request is received/approved is: 1. identify the resource in your library that will be used to fulfill the request 2. create a request (e.g. Ship Physically) to retrieve the item from its shelf and transit it to its pickup location 3. retrieve the item from the shelf 4. scan-in the item at the owning circ desk (i.e. the circ desk responsible for retrieving the item). Alma indicates the next step (e.g. transit to Resource Sharing Library) and prints a slip (optional) 5. item is scanned-in at the next step location (e.g. Resource Sharing Library). Alma indicates the next step (e.g. place on hold shelf), prints a slip (optional) and sends a notice to the patron. The slip(s) that you print can be placed inside the item and should contain all required information. Please let me know if you have any questions about this. Best Regards, Shmuel

May 18 2016

Item Policy drop down when receiving a Resource Sharing item

Done!

May 16 2016

List of Borrowing Requests by Partner Code

Hi Lynne, Thanks for clarifying. The system number you are referring to is for the bibliographic record in Alma, which may not be known at the time the lending request is received/created. Can you please explain the use case here? Thanks. Shmuel

Borrowing External Resource Search

Hi Lynne, Apologies for the misunderstanding. It seems that you are creating a new borrowing request 'From External Resource'. Indeed, this has very limited search options. If you would like additional options in the search, I suggest you submit this to the Idea Exchange and/or NERS. It might be helpful there to explain your scenario. I would think that, in most cases, the borrowing request is received from the end user via Primo, with all necessary bibliographic metadata (you can configure mandatory fields in the request form). In the event that the request is created by staff in Alma on behalf of a patron, I would think that you would enter the bibliographic metadata manually in the request form (or via repository search) and allow Alma to identify an appropriate partner, using locate profiles and rota assignment rules. Best Regards, Shmuel.

Resource Sharing TOU

Hi Lynne, The Resource Sharing Fee assessed automatically to the patron is configured in the Borrowing Resource Sharing TOU. The amount assessed automatically can be overridden manually in the request itself. There is nothing in the TOU that would automatically apply a different fee depending on the shipped format. Best Regards, Shmuel

Migration of My Sets (Saved Queries) in the Advanced Repository Search

Hi Lynne, Saved Alma sets and search queries will not be preserved. Saved Analytics reports and dashboards will be preserved. Best Regards, Shmuel

Borrowing External Resource Search

Hi Lynne, Perhaps there is a misunderstanding? I am referring to Resource Management > Cataloging > Search External Resources. See below. Shmuel

List of Borrowing Requests by Partner Code

Hi Lynne, I am not sure what advantage there would be to using the Find menu instead of the facets to find requests per partner. Once you open the Borrowing Requests list, no searching is necessary in order to filter/facet. Concerning the addition of a 'system number' index to the Find box, I am not sure what system number you are referring to. Both the External ID and the Internal ID of the request are already searchable. What other 'system id' are you referring to? Thanks for clarifying. Best Regards, Shmuel

May 15 2016

List of Borrowing Requests by Partner Code

Hi Lynne, In the Borrowing Requests screen, you filter/facet by Active Partner and then export the results to an Excel file (Tools > Excel). Let me know if there is something more to your question. Thanks. Best Regards, Shmuel

Borrowing External Resource Search

Hi Lynne, I believe that if you search 'Contains Keywords', instead of the default 'Contains Phrase', you should see the same results as if you searched ULI directly. Best Regards, Shmuel

Borrowing Receive Slip

Hi Lynne, No, not automatically. You can print the slip manually (via the Monitor Requests & Item Processes screen) without scanning it in. Best Regards, Shmuel

Maximum Cost

Hi Lynne, Indeed! I guess that leaves the Maximum Fee field. Or one of the note fields in the body of the request which, as you know, is included in the request information sent to the vendor (unless, perhaps, you add it afterwards). You may be heartened to know that the road map for next year includes the ability to attach requests to patron assigned funds. Best Regards, Shmuel

May 11 2016

Maximum Cost

Hi Lynne, I guess you mean the Maximum Fee field? I would suggest, instead, adding a note containing the budget number in the Notes tab of the Borrowing Request. (The content of the Notes tab is also retrievable/reportable via Analytics). Best Regards, Shmuel

Shipping Cost Lender Rules

Okay, thanks for the update. If you continue to experience this issue, please report it in a Salesforce case. Thanks.

Shipping Cost Lender Rules

How many partners can you add before receiving the error?

Resource Sharing TOU

Hi Lynne, May I suggest that we discuss this at the workshop on Sunday? Best Regards, Shmuel

Shipping Cost Lender Rules

Hi Lynne, No, there should not be a limit. I was able to reproduce the error you reported and it looks like a bug. In the meantime, you can select Partner Is Not Empty, which should be functionally comparable. Best Regards, Shmuel

RS Partner Addresses

Hi Lynne, We are investigating this. In the meantime, may I ask you to please open a case for this in Salesforce with some examples? Thanks. Shmuel

Pick From Shelf

Hi Lynne, This is configurable via Fulfillment Configuration Menu > Physical Fulfillment > Request Pickup Configuration. You do not have access to this link in your production environment. If you would like to make any configuration changes, please open a case. You can find information about this functionality in the Online Help:
[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_\(English\)/Fulfillment/080Configuring_Fulfillment/Physical_Fulfillment#Configuring_Request_Pickup_Rules](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Fulfillment/080Configuring_Fulfillment/Physical_Fulfillment#Configuring_Request_Pickup_Rules) Best Regards, Shmuel

Disabling Lending Auto Assign

Hi Lynne, We have set rs_disable_lending_auto_assign=true in your Alma Sandbox and Production environments. Best Regards, Shmuel

May 10 2016

Rejected Borrowing Request - Workflow

Hi Lynne, You can add additional partners when creating the request and/or afterwards. You can (re-)submit the request to a different partner via the Rota tab of the request. Let me know if you still have a question about this. Best Regards, Shmuel

May 5 2016

Rejected Borrowing Request - Workflow

Hi Lynne, Are you familiar with Rotas? It sounds like this may be the solution to the scenario you are describing. See the Online Help:
[http://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_\(English\)/Fulfillment/050Resource_Sharing/020Managing_Resource_Sharing_Borrowing_Requests/Configuring_Rota_Templates](http://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Fulfillment/050Resource_Sharing/020Managing_Resource_Sharing_Borrowing_Requests/Configuring_Rota_Templates) Shmuel

Resource Sharing TOU

Hi Lynne, A quick look at your resource sharing TOUs seems to indicate that lending and borrowing are enabled. May I ask you to please open a case in Salesforce with example(s) of scenario(s) that are not working? Thanks. Shmuel

Shipping Cost Lender Rules

Hi Lynne, I don't know how many rules you might need - at least one for each distinct shipping cost/amount. The input parameters can be used together (in a Boolean AND) and each input parameter may have multiple values (in a Boolean OR). For example: IF Partner=(partner A OR partner B OR partner C) AND Shipped Format=(Digital OR Physical non-returnable) THEN Shipping Cost=10 Hope this helps. Best Regards, Shmuel

May 3 2016

Shipping Cost Lender Rules

Hi Lynne, If I understand correctly, yes, this is meant to be done automatically. The shipping cost rules can be configured according to partner, shipped format (digital, physical and/or physical non-returnable), and/or Level of Service. If the request matches the input parameters of the rule, the output (i.e. the shipping cost) should be assessed automatically. Best Regards, Shmuel

April 20 2016

Sending digital Borrowing and Lending RS Requests

Hi Lynne, Thanks for the update. I am glad you worked this out. Apologies for not responding earlier, but I was not aware of your recent posts - I rely on the email alerts sent automatically by Basecamp to the users selected below. (I see that you have turned off email alerts for yourself). In the future, it might be helpful if you select the relevant users before posting your comment. This will ensure that they are alerted to your post. Thanks. Best Regards, Shmuel

April 14 2016

Link to ILL form in Primo

Hi Nir, Perhaps you are referring to this:

[http://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_\(English\)/Alma-](http://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Alma-Primo_Integration/Configuring_Alma%E2%80%99s_Delivery_System/Adding_a_General_Electronic_Service#ww1360206)

[Primo_Integration/Configuring_Alma%E2%80%99s_Delivery_System/Adding_a_General_Electronic_Service#ww1360206](http://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Alma-Primo_Integration/Configuring_Alma%E2%80%99s_Delivery_System/Adding_a_General_Electronic_Service#ww1360206) Shmuel

April 13 2016

Resource Sharing Invoices

Hi Lynne, I am not a big expert in Analytics. Off the top of my head, I would think that you could use a date field to filter for charges created subsequent to the previous run of your report. You may want to post your query to the Alma-L list. Analytics questions are a frequent topic of discussion there and often receive input from customers who have confronted and resolved the same question. Best Regards, Shmuel

Sending digital Borrowing and Lending RS Requests

Hi Lynne, Yes, if the URL was added during the digitization workflow, a link to the URL is included in the notification. Shmuel

April 12 2016

Sending digital Borrowing and Lending RS Requests

Hi Lynne, Thanks for this. Concerning the Document Delivery version of the Digitization workflow, the email to the patron is sent from within Alma. Concerning Resource Sharing requests, Alma automatically sends the digitized file from the Lending Partner to the Borrowing Partner as an attachment to the Notification Item Letter (generated automatically upon processing the digitization request). From there, the Borrowing Partner might need to forward the digitized file to the patron via regular email (i.e. not via Alma). However, if the patron's email address has been included in the Lending request, the file is sent directly to the patron (in addition to the Borrowing Partner) as an attachment to the Notification Item Letter. Best Regards, Shmuel.

April 11 2016

Sending digital Borrowing and Lending RS Requests

Hi Lynne, Can you please point me to the hands-on exercise you are referring to? Thanks. Shmuel

April 10 2016

Resource Sharing Follow-up from session on 3.4.16

Hi Lynne, Apologies for not understanding your question. The automatic locate does not create the request automatically. The resource sharing staff must review the available fulfillment options and decide whether to create the hold request (or, alternatively, fulfill the lending a request in some other way, for example a digitization of the requested material) and on which item. Best Regards, Shmuel

April 7 2016

Resource Sharing Follow-up from session on 3.4.16

Hi Lynne, I believe I responded to these questions in an email I sent after the meeting - attached and copied below for your convenience. Please let me know if I have not addressed your questions, or if additional questions remain. Thanks. Best Regards, Shmuel

Hi All, Following-up on the questions raised during yesterday's call: 1. For information on adding a General Electronic Service, for example, to display a Resource Sharing Link in the Primo GetIt and/or ViewIt tabs, including examples of openURL link syntax for ILLiad: [http://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_\(English\)/Alma-Primo_Integration/Configuring_Alma%E2%80%99s_Delivery_System/Adding_a_General_Electronic_Service#ww1360206](http://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Alma-Primo_Integration/Configuring_Alma%E2%80%99s_Delivery_System/Adding_a_General_Electronic_Service#ww1360206)

2. Concerning notes submitted by a patron as part of a Resource Sharing Borrowing Request, which should not be forwarded to the Partner: By default, both notes are sent to the Partner ("Note" and "Request Note"). The relevant notification template can be modified to remove one or the other of these fields from the e-mail sent to the Partner. The patron's comment remains as part of the request, but will not be sent to the Partner. The relevant letter is: Administration > General Configuration Menu > Customize Letters > Outgoing Email Letter.

3. Concerning automatic 'locate' for Resource Sharing Lending requests, this is supported, as described

in: [http://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_\(English\)/Fulfillment/Resource_Sharing/Locating_Items#Lending_Locate_Process](http://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Fulfillment/Resource_Sharing/Locating_Items#Lending_Locate_Process)

Fulfillment - Automatic Renewal question

Hi, By configuring the 'Maximum Renew Period' policy in the applicable loans TOU to 'None', as it currently is, loans can be renewed indefinitely (unless, for example, the patron expiration date is reached, the loaned is requested/recalled, the patron is blocked, etc.). If this is not working the way you expect, please open a case in Salesforce with some relevant examples. Thanks. Best Regards, Shmuel

March 28 2016

Resource Sharing - Lending

Hi, This sounds like a configuration issue. Please open a case in Salesforce with details (item barcode example, user id example, what you would like to happen, what is actually happening). Thanks. Shmuel

Resource Sharing - Shipping items

Hi Marina and Boaz, In order for the Partner field to appear in the Shipping Items screen, the staff user must be 'Currently at' a circ desk of a resource sharing library that has been configured for 'Automatic Creation' of resource sharing lending requests. This is new functionality (March 2016). Cf.

[http://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_\(English\)/Fulfillment/Resource_Sharing/Resource_Sharing_Workflow#Shipping_Items](http://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Fulfillment/Resource_Sharing/Resource_Sharing_Workflow#Shipping_Items) Please let us know if you have further questions or if you would like us to make any configuration modifications. Best Regards, Shmuel

Resource Sharing - Lending

Hi Boaz, I have not been able to reproduce this issue. Please note that, in order for a partner to be searchable in the 'Supplied To' field, the partner must be active and be enabled for Lending. If you think there is still an issue here, please open a case in Salesforce with an explanation of how to reproduce the issue. Thanks. Best Regards, Shmuel

Resource Sharing - Borrowing

Hi Boaz, There is currently no support for configuring the search screen to include advanced search options. Concerning the ability to search all external resources, you may want to consider configuring an External Search Profile that contains multiple search resources/targets (e.g. for each of your resource sharing partners). Alternatively, please note that Resource Sharing functionality in Alma supports 'rota' (a list of potential partners/providers of the requested resource) as well as 'locate' profiles (the ability to automatically search the potential partner/provider's catalog to verify the presence/availability of the requested item).

We are scheduled to discuss Resource Sharing during our call on Sunday, April 3. Let us know if you have more questions in the meantime. Thanks. Best Regards, Shmuel

Resource Sharing - Pickup Location

Okay, thanks.

February 29 2016

Resource Sharing - Pickup Location

Hi, Please open a case in Salesforce and we will be happy to modify the configuration. Please include an example user id, what is currently happening, and what you want to happen (e.g. do you not want Home Delivery?). Thanks. Shmuel

Resource Sharing Partners

Hi Boaz, No, resource sharing partners will not be re-migrated during cut-over. Changes that you make now in Alma will not be overwritten. Shmuel

February 28 2016

Resource Sharing Partners

Hi Lynne, This sounds like it might be a migration issue. May I ask you to please open a case in Salesforce? Thanks. Shmuel

Resource sharing - missing functions in menu

Hi, These menu links depend on your role (e.g. Fulfillment Services Operator/Manager with a scope of the Resource Sharing Library). Cf.

[http://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_\(English\)/Fulfillment/Resource_Sharing/Managing_Resource_Sharing_Borrowing_Requests#ww1263794](http://knowledge.exlibrisgroup.com/Alma/Product_Documentation/Alma_Online_Help_(English)/Fulfillment/Resource_Sharing/Managing_Resource_Sharing_Borrowing_Requests#ww1263794)

February 16 2016

Resource Sharing Invoices

Hi Lynne, I am not sure I fully understand your request, perhaps because I am not familiar with your workflow. You can assign a shipping cost to each lending request and then run a report in Analytics to find the total shipping cost incurred per partner per month, for example. Let me know if you need more information. Best Regards, Shmuel