



# Processing Lending Locate Failures

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# Agenda

- Overview of the Locate Process
- Recent Changes to Locate Settings
- Processing Locate Failures
- Questions

# Locate Process Overview

- Each campus has a Locate Profile, which is configured in the Network Zone and then distributed to each campus
- When a RS request is submitted by a user, Alma performs an automated z39.50 search of each campus using the Locate Profile settings
  - All locate profiles are configured to search on Title, Author, ISBN, and LCCN
  - Availability and requestability (as defined by Request TOUs) are taken into account
  - The order in which these searches are performed is determined by rota configuration
- If the automated z39.50 search of a campus produces any results, that campus is added to the request's rota

# Locate Process Overview

- When a RS request is received by a lending library, another automated z39.50 search is performed
  - The parameters of that search are determined by Resource Sharing Library settings
  - Everyone is configured to search on Author, Title, ISBN, and LCCN
  - Availability and requestability (as defined by Request TOUs) are taken into account
- If the search produces one result, the request is attached to the bib record for that result and it is placed in the Being Processed status
- If the search produces no results or multiple results, the request is not attached to a bib record and it is placed in the Locate Failed status

# Locate Process Overview

- If the first search must produce at least one result for a library to be added to the rota, then how can the second search produce no results?
- The borrowing locate process uses a broader search to ensure it doesn't miss potential lenders, and the lending locate process uses a more narrow search to ensure the borrowing locate process didn't produce a false positive.
- Unfortunately, Ex Libris did not share the details of exactly how those searches differ with me

# Recent Changes to Locate Settings

- Alma resource sharing fill rates have hovered between 55% and 60% since September
- Fill rates lower than expected, so samples of unfilled requests were closely examined
- It was discovered that the locate process was missing some SUNY holdings because of issues with SUNY holdings being spread out over multiple records with different OCLC numbers

1  [All together now : the first complete Beatles discography, 1961-1975 / by Harry Castleman & Walter J. Podrazik.](#)

**Book (Book - Physical) text; unmediated; volume** By Castleman, Harry. (Ann Arbor, Mich. : Pierian Press ©1976.)

**ISBN: 0876500750** and others

**Subject:** Beatles--Discography. Harrison, George,--1943-2001--Discography. Lennon, John,--1940-1980--Discography. and others

**Series:** Rock & roll reference series ; 1.

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2  [All together now : the first complete Beatles discography, 1961-1975 / by Harry Castleman & Walter J. Podrazik.](#)

**Book (Book - Physical) text; unmediated; volume** By Castleman, Harry. (Ann Arbor, Mich. : Pierian Press 1976.)

**ISBN: 0876500750** and others

**Subject:** Beatles--Discography. Beatles. Discographies.



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3 [All together now : the first complete Beatles discography, 1961-1975 / by Harry Castleman & Walter J. Podrazik.](#)

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**Subject:** Beatles--Discography. Beatles. Discographies.

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# Recent Changes to Locate Settings

- All locate settings initially included OCLC number in addition to Author, Title, ISBN, and LCCN, but the OCLC number was removed from locate settings at all campuses in mid-February in hopes of improving fill rate
- Fill rate statistics:
  - January 20 - February 19: **58.1%**
  - February 19 - March 5: **60.5%**
- Unfortunately, this change has increased the number of lending requests that end up in the Locate Failed status
- Most lending locate failures are caused by issues with the Author field, but there are no plans to remove the Author field from locate settings
- Ex Libris has been discussing these issues with us, and they plan to do additional work on the locate process



# Processing Lending Locate Failures

- Lending requests where the locate process fails end up in the Locate Failed status
- Locate failure volumes haven't been too high, but you should check for them every day you're processing lending requests
- Instructions on how to process lending locate failures can be found here:
  - <https://slcny.libguides.com/c.php?g=986100&p=7131254#Locate%20Failures>