


# Advances Resource Sharing Lending Workflows

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# Agenda

- Generally speaking, libraries are keeping on top of their lending requests, but some statuses aren't being monitored regularly
  - Locate failed
  - Renewal requested
- General messages aren't always being monitored
- Conditional feature now available
- Hoping to improve service by drawing more attention to these features & statuses

# Agenda

- Will be covering:
  - Locate Failures
  - Conditional Messages
  - General Messages
  - Lending Renewals
  - Lost and Damaged Items
- Won't be covering:
  - Printing, shipping, rejecting, and completing requests
  - ILLiad integration

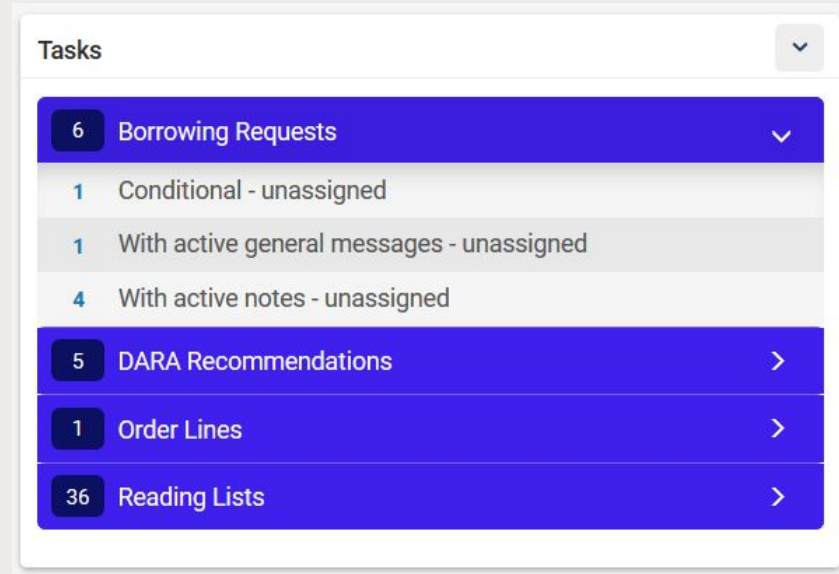
# Borrowing Workflow Session

- December 13th at 1:00pm
- Register at : <https://slcny.libcal.com/event/6108438>
- Will cover:
  - requests being exported to ILLiad
  - renewal requests
  - conditional messages
  - general messages
  - lost & damaged items

# The Tasks Widget

- Easy way to monitor request tasks lists from the main Alma page
- Best way to monitor general messages and notes
- Anyone can add this widget to their main Alma Page
- Tasks that are displayed depend on your user roles
- FAQ on how to add the tasks widget:

– <https://slcny.libanswers.com/faq/278476>



# Lending Request FAQ

- <https://slcnny.libanswers.com/faq/270716>

Q. How do I process resource sharing lending requests?

Answer

## Table of Contents

- User Roles Needed to Process Lending Requests
- Printing Pull Slips
- Shipping Requests
- Processing Locate Failures
- Sending Conditional Messages
- Rejecting Requests
- Renewing Requests
- Sending General Messages
- Completing Requests

# Locate Failures

- When a borrowing request is created, Alma searches each SUNY campus to see which campuses might be able to fill the request
- Initial search is broad and can produce false positives
- A new search is performed every time a lender receives a request
- If that search fails, the lending request is put in the “Locate failed” status
  - Request with incomplete metadata
  - Article requests
  - Library owns item in both print and electronic

# Locate Failures

- Staff must manually search their holdings to determine if they own the requested item
- If the requested item is found, the request is matched to the bib record and the rest of the lending process plays out as usual
- If the requested item is not found, the request should be rejected (unless there is a problem with the request)



# Conditionals

- Can be used to request additional information from borrower or provide borrower with information prior to filling a request
- When to use conditionals:
  - Requests for multi-volume sets, item is in poor condition, etc.
- If the borrower says yes, an active note is added to the request and the request's status changes to Being Processed
- If the borrower says no, request's status will change to Rejected the borrower request, and it will disappear from your list of active lending requests
- Conditions create extra work and slow down requests, so please use sparingly

# General Messages

- Can be used to send messages to the borrowing library
- General messages are attached to the borrowing request, and responses are attached to your lending request
- Use general messages if:
  - There is a problem with the request (article request, bad metadata, etc.)
  - Shipping issues
- Do not use general messages in place of the Conditional feature

# Lending Renewals

- Resource sharing TOUs are configured in accordance with SLC resource sharing policies
- Renewal requests not allowed by SLC policy are automatically blocked on the borrowing side
- Any renewal request received from a borrower is allowed by SLC policy and should be approved
- Please update your due date to the borrower's desired due date

# Lost and Damaged Items

- The Lost function can be used if an item is either lost or damaged by the borrower
- Sends a general message to the borrower (if you check the Send General Message box) and updates the status of lending request to Lost
- Changes item process status to Lost Resource Sharing Item
- Alma does have a Damaged function too, but it does not send any message to the borrower
- Use Lost function for damaged lending items too