



Advanced Resource Sharing Borrowing Workflows

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Lending Workflow Session

- Covered locate failures, conditional messages, general messages, lending renewals, lost and damaged items
- Recording available here:
 - <https://public.3.basecamp.com/p/Kp5Ji4kxmgnF3cjiXwWvuAh>
- Problem with requests in Conditional status not timing out
- Sending a General Message should not assign the request to you

Agenda

- Will be covering:
 - requests being exported to ILLiad
 - renewal requests
 - conditional messages
 - general messages
 - lost & damaged items
- Won't be covering:
 - Receiving, returning, and cancelling requests
 - ILLiad NCIP integration

Borrowing FAQ

- Covers all borrowing workflows
- <https://slcnyc.libanswers.com/faq/270926>

Q. How do I process resource sharing borrowing requests?

Answer

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Tasks Widget

- Allows you to see tasks that must be completed from the main Alma page
- Easiest way to find requests with general messages and active notes
- How to configure:
 - <https://slcnyc.libanswers.com/faq/278476>

Requests being Exported to ILLiad

- Applies only to libraries exporting requests to ILLiad via API
- More Information:
 - <https://public.3.basecamp.com/p/LjAEjWXFpnepwJABVZdZ2caU>
 - <https://slcnyc.libanswers.com/faq/274823>
- Alma will check to see if user has an ILLiad account
 - If so, request is exported automatically
 - If not, request stays in ready to be sent status and an active note is added to the request

Requests being Exported to ILLiad

- Requests in Ready to be Sent status that must be exported to ILLiad are assigned to ILLiad resource sharing partner
 - Submit case to Ex Libris if request in Ready to Be Sent is assigned to any other partner
- Must create an ILLiad account for the user
 - <https://support.atlas-sys.com/hc/en-us/articles/360011811174-Adding-New-Users-Manually>
- Manually resend request in Alma
- Request will be exported to ILLiad

Requests being Exported to ILLiad

- Alma request may close once it is exported to ILLiad if you have the “close request when exported” box checked in your ILLiad resource sharing partner
- We recommend keeping exported requests open
- Changes to NCIP addon will allow the addon to update the original Alma request instead of creating a new request, but the original request must be kept open

Renewal Requests

- If a user submits a renewal request from Primo, the request's status will change to Mediated Patron Renewal
- Use the Request Renew function to send renewal request to lender
- Can also use Request Renew function to submit renewals for users
- Must select a new due date (not possible to auto-populate)
- Renewal notification sent to user as soon as renewal request is sent to lender
- Lenders are required to approve renewals per SLC policy

Conditional Messages

- Requests with conditional messages from lenders are in the Conditional status
- Message from lender also appears as an active note
- Use the Conditional Reply function to respond
- Important to keep on top of conditionals!

General Messages

- Can be used to send messages between libraries
- Use general messages if:
 - There is a problem with the request (ex. you received the wrong item)
 - Shipping issues (ex. Item shipped three weeks ago but still hasn't arrived)
- Do not respond to conditional requests with general messages
- Important to keep on top of general messages!
- Can be found using either the tasks widget or the borrowing request list facets

Lost & Damaged Items

- Lost and Damaged functions can be used to let a library know if you've lost or damaged one of their books
- Both functions let you add a note explaining the situation
- Requests status updated to either Lost Communicated or Damage Communicated
- Also updates lending requests