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# Alma

## Resource Sharing

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Hands-On Activities

Lending Resource  
Sharing: Physical

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Ex Libris Training Services

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## Prerequisites for this Exercise

This exercise assumes Resource Sharing Configuration is in place

It is recommended to use this in your production environment during your implementation/testing phase with your own Fulfillment Configuration.

The following Configuration is accessible to Users with appropriate Roles but please consult with your project team as necessary.

**Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Partners**

**Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Workflow Profiles**

## Create a Lending RS Request

### Goals of this exercise:

- Create a Lending Resource Sharing Request for the Borrowing Library

1. Ensure your user has a "Fulfillment Services Operator" Role at the RS library
2. Start the exercise by being **currently at the Resource Sharing Library-Resource Sharing Desk**. This can be seen at the top center of the screen. If the display shows that you are **currently at another location**, please click on the location and change this to the **Resource Sharing Library-Resource Sharing Desk**.
3. Click the **Alma icon** at the top left to open the Alma menu, or press F2. Select *Lending Requests* under **Fulfillment**. The Resource Sharing Lending Requests Task screen displays.
4. Click on the **Add** button and Choose *From Search* from the **Add** options. Then choose the index you would like to search in the **Where** field, noting the different indexes available to you in the drop-down. Finally, enter the word/term(s) to search into the **Contains** field.  
  
For this exercise, in the Where field choose *Title* as the index to search, and enter *Life of Birds* as the search terms in the Contains field. Then click the **Go** button.
5. Examine the list of results. Note that the results are per title with bibliographic information. Also note the sort options at the top and the availability of the Physical version.
6. Click the Radio button for record with the title *Birds of the World*. Click **Select** button at the top or bottom of the screen
7. The *Resource Sharing Lending Request* form displays.
8. In the **Supplied To** Field select a Lending Partner.
9. Enter an **External Identifier**
10. Select Format **Physical** and complete other fields as necessary.

11. Click **Save**. Note the Request Status and the Resource Locate Status field.
12. Click the **Manage Fulfillment Options** link. You are taken to the *Manage Resource Options* screen
13. Click **Place Request** link. You are taken to the *Create Request* screen.
14. Click the **Request Type** field, select *Ship Physically*.  
  
Note the *To* field contains *Resource Sharing Library*.
15. In the **Request Attributes** section, select *Lending Resource Sharing Requests* as the value for the Destination Location and click the **Add Request Attribute** button.

16. Click on the **Submit** button to create the lending request.
17. A confirmation message displays at top of the screen: *1 out of 1 requests were successful. 0 Due back dates were modified. 0 resource is already in the desired location.* Notice the alert *Citation Move Request in Process*. At the bottom of the screen, the request displays with its ID. It is now being managed by the owning library of the physical item.

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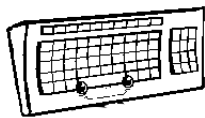
1 The life of birds.
ID: 88150630000541 Queue: 0
Pickup Location: Resource Sharing Library Request Date: 03/18/2014
Call Number: QL673 .W38 Barcode: 72517
Managed By Library: Main Library Managed By Desk: Main Library Circulation
Workflow Step: Pickup From Shelf Process Status: New Process Date: 03/18/2014 Expiration Date: 03/25/2014
Request Type: Ship physically External Request Id: 88150610000541
View Audit Trail | Edit | Cancel | Update Expiry | Mark as Missing | Print Slip | View title in search
    
```

(Note: Each request receives a unique request id.)

## Process Physical Item Request for On-Shelf Item

### Goals of this exercise:

- Process a physical item (hold) request for an available item that is sitting on the open shelves to send to the Resource Sharing Library.



Your task list will show you Requests waiting for pickup from shelf

1. In this exercise, the item will be retrieved from the shelf by Circulation Desk staff and transited to the Resource Sharing Library. Check that you are **currently at: Main Library – Main Library Circulation**. This can be seen at the top center of the screen. If the display shows that you are **currently at** another location, click on the location and change to **Main Library – Main Library Circulation**
2. It is possible to find requests for items that are available on the shelves in two ways:
  - from the Tasks list (**Requests – pickup from shelf**) if you are **currently at** the relevant circulation desk  
or
  - from the Alma menu, by choosing **Pick From Shelf** under Fulfillment.
3. In the top-center of the screen, check that you are **currently at: Main Library – Main Library Circulation**. Click on the location to change it if needed.
4. Open the Alma menu (F2) and choose **Pick From Shelf** from the Fulfillment submenu. This displays requests that are waiting to be filled by items currently available and on the shelves. Notice the facets on the left for refining the list.
5. For the request you placed, click the number to the right of the **Requests** field and notice the details displayed. Make a note of the barcode; you will need it later.

	<p>1 <input type="checkbox"/> <b>The life of birds.</b>          Location: Stacks Call Number: QL673 .W38          Requests: 1 Author: Welty, Joel Carl, 1901-          Imprint: Philadelphia, W B Saunders Co 1962.  <a href="#">Print Slip</a>   <a href="#">Edit</a>   <a href="#">Cancel Request</a>   <a href="#">Update Expiry</a>   <a href="#">Mark as Missing</a></p> <p>6. Click <b>Back</b> to return to the list.</p> <p>7. Assume that the slip for the request has been printed and the item has been retrieved from the shelf. When we return with the item, we can <b>Scan in Item</b> to fill the request. From the Alma menu, choose <b>Scan in Items</b> from the Fulfillment submenu.</p> <p>8. The Scan In Items screen displays. <b>Scan in/enter the item barcode</b> that was recorded previously and click <b>OK</b>. [Note that it is also possible to Print Slip from the Scan In Items screen, and/or enter the Request ID instead of the item barcode.]</p> <p>9. The item displays below with the destination of <b>Resource Sharing Library</b> and Request/Process type <i>Ship Physically</i></p> <p>The item can be sent to the Resource Sharing Library for further processing.</p>
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## Processing and Completing the Lending Resource Sharing Request

### Goals of this exercise:

- Once the item has been retrieved and sent to the RS library the Lending Request can be sent to the lender.

- Now switch to the Resource Sharing Library to process the request and send to the lender. To continue with the exercises check the **currently at** location at the top center of the screen. Click on the location and change to **Resource Sharing Library – Resource Sharing Desk**
- From the Alma menu, choose **Scan in Items** from the Fulfillment submenu.
- The Scan In Items screen displays. **Scan in/enter the item barcode** that was recorded previously and click **OK**. [Note that it is also possible to Print Slip from the Scan In Items screen, and/or enter the Request ID instead of the item barcode.]
- The item displays below with the destination of **System – [Borrowing Partner- External ID]**

Activated	Title	Destination
	The life of birds.	System - AB/C-1 University of Wales Request - EXL7654

Click **Exit**

- To see the status of the Request. Click the **Alma icon** at the top left to open the Alma menu, or press F2. Select *Lending Requests* under **Fulfillment**.
- Examine the list of results. Note that the request now indicates the Request Status as "Shipped Physically" and that it is "temporarily moved" to the Resource Sharing Library (Lending Requests).



1  [The life of birds. Illustrated by Norman Tolson.](#)  
**Book** By Welty, Joel Carl, (Philadelphia, W B Saunders Co 1962.)  
**Subject:** Birds.  
**Availability:** Physical version at **MAIN: main; QL673 .W38**  
 Physical version at **RES\_SHARE: IN\_RS\_REQ; QL673 .W38** (1 copy, 0 available)  
**Barcode:** 72517  
**External Identifier:** EXL7654  
**Request Status:** Shipped Physically  
**Resource Locate Status:** Resource Located  
**Alerts:** Citation Move Request Completed  
 Citation Move Request In Process  
[Edit](#) | [Manage Fulfillment Options](#) | [Duplicate](#) | [Reassign](#) | [Release Assign](#) | [Print Slip](#) | [Ship non-returnable](#)

In our example scenario, the borrowing library is now returning the item to the Resource Sharing Library. Remaining **currently at – Resource Sharing Library** From the Alma menu, choose **Scan in Items** from the Fulfillment submenu. Enter the item barcode and click **OK**.

Notice when the item is scanned in that a message displays: The item’s destination is: Main Library to be transited back to the owning library for return to the shelves.

- To see the status of the Request. Click the **Alma icon** at the top left to open the Alma menu, or press F2. Select *Lending Requests* under **Fulfillment**.

2  [The life of birds. Illustrated by Norman Tolson.](#)  
**Book** By Welty, Joel Carl, (Philadelphia, W B Saunders Co 1962.)  
**Subject:** Birds.  
**Availability:** Physical version at **MAIN: main; QL673 .W38** (1 copy, 0 available)  
**Barcode:** 72517  
**External Identifier:** EXL7654  
**Request Status:** Request Completed  
**Resource Locate Status:** Resource Located  
**Alerts:** Citation Move Request Completed  
 Citation Move Request In Process  
[Edit](#) | [Manage Fulfillment Options](#) | [Remove](#) | [Duplicate](#) | [Reassign](#) | [Detach from MMS](#) | [Release Assign](#) | [Print Slip](#) | [Ship non-returnable](#)

In this example the status is *Request Completed* (note this can be determined by configuring the lending workflow profile).