Care and Feeding of Alma Resource Sharing Queues

Heidi Nance & Meghan Williams
University of Washington Libraries
Alliance Summer Meeting July 12, 2016
Borrowing Request Statuses

- Daily
- Weekly
- Monthly

https://www.orbiscascade.org/discovery-delivery/
Borrowing Request Statuses

Daily

• Active Notes
• Active General Messages
• Ready to be Sent
• Returned by Patron
• Locate Failed (rare)
• Locate in Process (rare)
• Waiting for Cancel Response (rare)

https://www.orbiscascade.org/discovery-delivery/
Borrowing Request Statuses
Weekly and Monthly

• Weekly
  • Shipped Physically
  • Request Sent to Partner
  • Returned Item to Partner

• Monthly
  • Request Completed (analytics)

https://www.orbiscascade.org/discovery-delivery/
Lending Request Statuses

Daily and Weekly

- **Daily**
  - Being Processed
  - Created Lending Requests
  - Locate Failed
  - Active Notes
  - Active General Messages

- **Weekly**
  - Shipped Physically
  - Returned by Partner

[https://www.orbiscascade.org/discovery-delivery/](https://www.orbiscascade.org/discovery-delivery/)
Our Libraries

- UW Bothell
- Suzzallo
- Art
- UW Tacoma
- Physics/Astronomy Reading Room
- Odegaard
- Health Sciences
- Engineering
Our Libraries

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Our Libraries

Summit Staff @ Resource Sharing Library

- Heidi Nance
- Bernie Noll
- Jennie Rossie
- Jason Cabaniss
- ~ 7 student employees
Our Libraries

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**Fulfillment @ Each Circulation Desk**
- Students
- Staff
So how do we do queue maintenance in such a distributed system?
1. Only staff at the Resource Sharing Library do queue/request maintenance.
2. We incorporated Jesse’s instructions into our local procedures in our staff intranet (Staffweb).
Returned too long

Items we marked returned that have not yet been checked in by the owning library

In Borrowing, scope to Returned item to Partner and up to a month ago

Export to Excel and sort by Update date;

For anything more than 2 weeks old, email the lender to see if the item is actually back - the request may have been checked in there but not up.

If the lender reports the item is back, update manually to completed if necessary.

If it is not back, check Suzzallo stacks for the book just in case and report to the owning library if not found. The owning library will decide when to declare the item lost.

If the item is not found add a note saying that and change the status of the request to Declared Lost by Partner. This is our IAR queue and will be sent to a librarian to review.

If the lender does not reply after 2 tries and the status does not change, try emailing instead. If you still get no reply park the request in Declared Lost.
3. We use the ToDoist task management tool to assign tasks to Summit staff. This accommodates out of office issues, too.
In Transit too Long
weekly, summit-borrowing, summit-lending
4. We each have somewhat unique roles, but are cross-trained on the basics.
Analytics - Extra

• In Transit Too Long
• Missing Titles
• Very Old Requests
### Tasks

<table>
<thead>
<tr>
<th>Task</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requests - All - pickup from shelf</td>
<td>21</td>
</tr>
<tr>
<td>Borrowing requests returned by patron</td>
<td>2</td>
</tr>
<tr>
<td>Borrowing requests with active general messages</td>
<td>1</td>
</tr>
<tr>
<td>Borrowing requests with active notes</td>
<td>1</td>
</tr>
<tr>
<td>Lending requests with active general messages - unassigned</td>
<td>1</td>
</tr>
<tr>
<td>Lending requests failed locate - unassigned</td>
<td>6</td>
</tr>
<tr>
<td>Status</td>
<td>Request Reported</td>
</tr>
<tr>
<td>-------------------</td>
<td>------------------</td>
</tr>
<tr>
<td>Locate failed</td>
<td>No</td>
</tr>
</tbody>
</table>


**LCCN**: 56009413  **OCLC Number**: 1554411

**External identifier**: ALLIAN  **Requested Media**: Any

**Request Status**: Locate failed  **Resource Locate Status**: No Resources Located

**Request Printed**: No  **Request Reported**: No

**Creation Date**: 06/02/2016  **Update Date**: 06/02/2016

[Edit] [Duplicate] [Rescind] [Locate] [Search] [Reject] [Ship non-returnable] [Ship Item] [General Message] [More details]
<table>
<thead>
<tr>
<th>Name</th>
<th>Date modified</th>
<th>Type</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Old issues</td>
<td>6/6/2016 9:41 AM</td>
<td>File folder</td>
<td></td>
</tr>
<tr>
<td>AP8 list.docx</td>
<td>3/10/2016 11:42 AM</td>
<td>Microsoft Word Document</td>
<td>13 KB</td>
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<td>Borrowing - Request Completed.xlsx</td>
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</tr>
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<td>Borrowing - Returned too long.xlsx</td>
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</tr>
<tr>
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</tr>
<tr>
<td>Borrowing - Shipped too long.xlsx</td>
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<tr>
<td>Lending - Returned too long.xlsx</td>
<td>5/25/2016 11:31 AM</td>
<td>Microsoft Excel Worksheet</td>
<td>11 KB</td>
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<tr>
<td>Lending - Shipped too long.xlsx</td>
<td>6/1/2016 9:53 AM</td>
<td>Microsoft Excel Worksheet</td>
<td>9 KB</td>
</tr>
</tbody>
</table>
### Selected Columns

Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to reorder them. Edit a column's properties, formula.

<table>
<thead>
<tr>
<th>Borrowing Request Details</th>
<th>Borrowing Creation Date</th>
<th>Borrowing Request Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>External Identifier</td>
<td>Borrowing Creation Date</td>
</tr>
<tr>
<td>Borrowing Request Status</td>
<td>Item Return Date</td>
<td>Modification Date</td>
</tr>
</tbody>
</table>

### Filters

Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on the filter button in the Filter pane header. A

- **Borrowing Request Status is equal to** / Is in **Request Completed**
- **Item Return Date is null**
- **External Identifier is not null**
- **Modification Date is greater than** 06/01/2016 02:30:25 PM