Alma Resource Sharing
Queue Maintenance at UO Libraries

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Seven Libraries
  • Knight
  • Law
  • Mathematics
  • Science
  • Architecture & Allied Arts
  • UO PDX
  • Oregon Institute of Marine Biology
UO Library System

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- Access Services Department
  - Resource Sharing Unit
    - Traditional ILL – 70,000
    - Document Delivery – 60,000
    - Summit Processing – 75,000
  - 5.5 FTE Classified Staff
    - Erica O’Grady, Summit Liaison, ericao@uoregon.edu
    - Kate Ball, Resource Sharing Operations Specialist, kdball@uoregon.edu
- 3.0 FTE Student Assistants
Resource Sharing in Iris

Resource Sharing

Resource Sharing at UO Libraries comprises the following programs:

- **Interlibrary Loan (ILL):** Lend and borrow material to and from libraries worldwide
- **Summit:** Lend and borrow material to and from libraries within the Orbis Cascade Alliance consortium
- **Document Delivery:** (Non-Returnable DocDel) Print material held by the UO Libraries is digitized for and made available to library patrons through their ILLiad accounts; (Returnable DocDel) returnable material (print material, AV, microform) is paged from the stacks and delivered to the requesting patron’s preferred pickup location, faculty department or home address (distance education patrons)

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Resource Sharing Unit of Access Services, Knight Library

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- Cheryl Bemiss, Resource Sharing Assistant 541-346-1936
- Kate Ball, Resource Sharing Operations Specialist 541-346-8273 kdball@uoregon.edu
- Vonda Welty, Resource Sharing Assistant 541-346-1917 vwelty@uoregon.edu
Resource Sharing in Iris

2. *Knight Library ILL Manual*
   a. ILL Lending Manual
   b. ILL Borrowing Manual

3. *Knight Library Summit 3 Manual*
   a. Summit 3 Lending Manual
   b. Summit 3 Borrowing Manual

4. *Knight Library Document Delivery Manual*
   a. Returnable Document Delivery
   b. Non-Returnable Document Delivery

5. *Knight Library LSA Manual*
Resource Sharing in Iris

Summit Lending Returns:

1. Separate Knight and branch library material

2. Mail branch library material to corresponding branch libraries via campus mail (red bag)

3. For Knight material:

4. Set “Currently At” desk to “Knight Library – Knight Checkout & Reserves”

5. Alma > Fulfillment > Resource Requests > Scan In Items

6. Scan item barcode and click “OK”

7. Route material to Knight sorting room for reshelving
   a. If item has an outstanding hold, fill out the yellow hold slip and give item to the individual responsible for processing Document Delivery
Lending Status Facets

- **Monitor Daily**
  - **Active General Message**: Requests are flagged as having an “active general message” when a borrowing library has sent a General Message to UO from within the request record. Generally, the library is asking us to take a certain action on the request.
  - **Being Processed**: This is the queue that most Summit lending requests land in and stay in until they are either shipped or rejected. We print requests from this queue daily, and also monitor this queue each day to ensure our lending requests are being fulfilled as expeditiously as possible.
  - **Created Lending Request**: Requests are assigned this status when Alma is unable to identify a specific item/resource that can satisfy fulfillment. We monitor this queue each day as part of the paging slip process.
  - **Locate Failed**: This status is assigned to records where Alma has been unable to find a specific match for the requested item in our catalog. We need to match these requests to items following the linked instructions.

- **Monitor Weekly**
  - **Returned by Partner**: Request records are assigned this status after the Borrowing library has returned the request/item, but UO has not yet “returned” the item in our system.
  - **Shipped Physically**: Requests are given this status when UO Libraries has shipped the request/item, but the Borrowing library has not yet received it.

- **No Monitoring Necessary**
  - **Cancelled**: Request records are assigned this status when the request has been terminated by the Borrowing library.
  - **Expired**: This status signifies requests that have expired. Currently, the expiry function is turned off in Alma. If you see requests in this queue, please notify the RS librarian.
  - **Received by Partner**: Requests go into this status when the Borrowing library receives the request/item.
  - **Rejected the Borrower Request**: When we reject a Lending request, it goes into this status.
  - **Request Completed**: After a lent item has been returned to UO Libraries, the related RS Lending request record goes to this status.
Lending Status Facets

Resource Sharing - Summit Manual - Lending - Queue Maintenance - Shipped Physically

1. Open Alma > RS > Lending Requests > Shipped Physically facet

2. Click Tools > Excel

3. Sort sheet by Update Date.

4. Count back 10 business days from today's date (allowing for courier transit time). Delete from the worksheet any dates older than 10 days. For the remaining items on the list, follow this process:

5. Send email to the borrower asking that they search their locations for the shipped item. Sample: "According to our records, this request was updated to shipped at UO over a week ago but has not been received at your location. Please check your records and shelves to see if this has arrived." Include the request information in the text of the email.

6. Monitor email replies from the borrowers. If item is not found by the borrower, search UO stacks.

7. Track the work done on the request by adding a Note to the borrowing request record. Example: "Sent email to borrower to search for shipped item."

8. If after 3 weeks the item is still missing, send out an All Points Bulletin "APB" on the courier listserv.

9. Within 30 days, the Summit Coordinator must submit a claim with the courier company for a lost item.
Borrowing Status Facets

**Daily**

- **Active General Message**: Requests are flagged as having an "active general message" when a lending library has sent a General Message to UO from within the request record. Generally, the library is asking us to take a certain action on the request.

- **Locate Failed**: These requests need to be cancelled, without notifying the patron, and then recreated. There is no way to push these through without creating bigger problems. Do not use the recalculate rota button; this adds all libraries to the rota, not just owning libraries, so libraries that do not own the title may get the request.

- **Locate In Process**: Request records are given this status when Alma is unable to locate potential suppliers, and not necessarily because no suppliers exist. We need to "help" Alma locate potential lenders and by manually pushing the request through the locate process.

- **Ready to Be Sent**: Requests are assigned this status when they get "hung up" trying to move on to potential lending libraries. We need to verify with the lender that there are active lending requests or manually move these stuck requests along.

- **Request Sent to Partner**: Requests are given this status when they are sent to partner libraries. Sometimes requests get "stuck" at a lending library and don't move through the rota in a timely way. Sometimes lenders need a reminder to fill or reject requests. We monitor this queue to ensure requests are fulfilled as expediently as possible.

- **Returned Item to Partner**: Requests records are assigned this status when borrowed material has been returned to but not yet received by the lending library. This queue needs to be monitored daily, but follow-up is only needed on requests that have been in this status for 10 business days or more.

- **Shipped Physically**: Requests in this status have been shipped to UO by a partner library, but have not yet been received by the library. This queue needs to be monitored daily, but only follow up on requests that have been in this status for 10 business days or more.

- **Waiting for Cancel Response**: Requests go into this queue when they are cancelled by the borrowing library staff, and we need to manually update the status to Cancelled.

**Biweekly**

- **Delete Temporary Bib/Item Records**: Occasionally, temporary item/bib records are not deleted automatically from the system. Every other week we run a job to delete these temporary records from Alma.

**No Monitoring Necessary**

- **Cancelled By Patron**: These requests have been cancelled by the patron from within their Primo account.

- **Cancelled By Staff**: Requests are assigned this status when Alma cannot identify potential suppliers, the request is cancelled and the patron notified.

- **Expired**: Requests are assigned this status when they have aged to Expired by the last possible supplier in the rota. The expiry feature in Alma has been disabled, so we shouldn't see requests in this queue. If you see any, please notify the Resource Sharing Librarian.

- **Loaned Item to Patron**: This is the status request records are given when borrowed material is checked out to the patrons.

- **Physically Received by Library**: Request records go to this status when borrowed material has been received by the library, but not yet checked out by the patrons. Lending Services monitors the hold shelf following the Clear Hold Shelf process. RS staff do not need to monitor this queue.

- **Rejected By Partner**: Requests are assigned this status when they have been rejected by all possible lending libraries.

- **Request Completed**: Request records are assigned this status at the end of their lifecycle, when the lending library has received their material back, finishing the transaction on their end.

- **Returned By Patron**: Request records go into this queue when the patron has returned the material, but the item was returned at a non-RS library. When the item is checked in at the Lending library, the status of these requests goes to Request Completed; no maintenance is necessary.
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