Process New For Review requests

Follow the instructions below to process New for Review requests.

**To process New for Review requests:**

1. From the Borrowing Requests category, click **New For Review**. The initial categories of Not Reviewed and Reviewed are listed.
   - Requests under Not Reviewed are requests that have not been seen by your staff. These requests originate from a source outside of your system.
   - Requests with a status of Reviewed have been saved by your staff, using the Save For Review feature.
2. Click the request **ID** or **Title** to display a request.
3. Review and confirm the information in the Request Details section.
4. If the citation needs to be verified, click the **magnifying glass icon**, next to the Title, Author or standard number fields, to search WorldCat via Discover Items. A contextual search is launched for the terms selected, and the Results screen appears.
5. On the Results screen, you have two options:
   1. Click the **item** you want to request. Bibliographic information appears. If applicable, click **Apply data**, OR
   2. Click a link to holdings, or use a Custom Holdings Path or Profiled Group. On the Holdings screen, add lenders to the Lender String, then click **Update request**.
      Note: The citation information for copy requests will display at the top of the Holdings screen and will remain as you scroll through potential lenders. Compare the lenders holding information in the **Holdings** column to the citation information of the copy request to be sure the lender has the exact volume needed to fulfill the request.
6. The request form appears, and the bibliographic data is updated.
7. Apply your constant data, and click **Send Request**.
8. A confirmation message appears and the request is updated.

**Filter holdings to build a lender string**

When viewing holdings for an item, you can filter the list of holdings to assist in building a lender string or—in some cases—a lender string can be built automatically.

**Filter by Custom Holdings Path**

You can filter holdings by a custom holdings path when the item requested is a book or other monograph as well as for copy requests where:

- The patron did not specify the year or volume.
- The holding libraries do not specify their year or volume-level holdings.

1. Select a **custom holdings path** from the drop-down list.
2. Click **Go**. The results list identifies the group of the holding library in the Group column. Groups are also delineated by a heavy gray line.
3. Click **Yes** in the Supplier column to add lenders to the string. You can add up to 15 lenders from the results list.

**Filter with Year and Volume**

When viewing holdings for a journal or other periodical, you can filter the list of holdings by year or year and volume.
1. Enter a **year** in the Year field
   Or
   Enter a **year** in the Year field and a **volume** in the Volume field.
2. Click **Go**. The results list is split into three sections, delineated by a heavy gray line:
   - Libraries that hold the year/volume
   - Libraries where local holdings are not available
   - Libraries that do not hold the year/volume
3. Click **Yes** in the Supplier column to add lenders to the string. You can add up to 15 lenders from the results list. A lender string will be added based on libraries that hold the year/volume.

### View local holdings and availability

Note: This functionality is currently only available for WMS libraries, libraries using Alma, and libraries using Sierra.

If your library has enabled local holdings and availability, patron-initiated requests submitted through automation will display local holdings information for items held by your institution. See [Automated Request Manager](https://help.oclc.org/Resource_Sharing/Tipasa/Borrowing_Requests/Process_requests).

- If you are a WMS library, please see [OPAC integration](https://help.oclc.org/Resource_Sharing/Tipasa/Borrowing_Requests/Process_requests) for more information about enabling this feature.
- If you are an Alma or Sierra library, please contact [OCLC Support](https://help.oclc.org/Resource_Sharing/Tipasa/Borrowing_Requests/Process_requests) to discuss enabling this feature.

### Single Holding

When a single holding is found, the **Local ID** and **Local Holdings** fields of the request are updated with the holdings information supplied by your OPAC. The Local Holdings fields include:

- Branch
- Shelving Location
- Call Number
- Holdings Source
  - Holdings Source will be listed as OPAC.
- Availability Status
  - For borrowing and Document Delivery, the lookup happens when the request goes through automation (which happens automatically when requests are placed by your users via the patron portal). See [Automated Request Manager](https://help.oclc.org/Resource_Sharing/Tipasa/Borrowing_Requests/Process_requests). If you need to check the Availability status manually, you can click [Search my library’s online catalog](https://help.oclc.org/Resource_Sharing/Tipasa/Borrowing_Requests/Process_requests).

The **Local ID** field is populated with the Branch, Shelving Location and Call Number information.
Multiple Holdings

When multiple holdings are returned by your OPAC, the View Local Holdings link will appear. The View Local Holdings screen will show each instance of holdings for the requested item.

Select which holding to use and click the Apply button. The information for the selected holdings will appear in the Local ID and Local Holdings fields and will be saved with the request.
Process Open Access requests

From the borrowing request page, follow the instructions to process Open Access requests.

If your library has enabled Document Delivery (recommended):

1. Click the Change Fulfillment Type drop-down at the top of the request page to Document Delivery.
2. Select Open Access Link from the URL Type drop-down menu.
3. Paste the URL into the URL Field.
4. Click the Mark as Complete button to save and update the request.
5. The link will be available to the patron in the User Portal.
   • If your library has configured automated Document Delivery to Library Patron notifications and the patron has selected to receive email or text message notifications, the appropriate notification will be sent.

Note: If your library has not configured automated notifications, you will need to manually send the notification before marking the request as complete.

6. The request status is updated to Closed (Supplied).

If your library has not enabled Document Delivery:

1. Click the Email button and select the appropriate template or fill out the form to send the patron the Open Access link for the item requested.
2. Open the Request and select **Open Access** from the **Change Fulfillment Type** drop-down to record fulfillment of the item. A confirmation message appears, and the request is updated to Closed (Open Access).

**Caution:** It is important to email the patron the Open Access link to the requested item before clicking Open Access because when the request is updated to Closed (Open Access), the patron information attached to the request will be cleared.

Note: Requests filled via Open Access will be included in monthly statistical reporting.

### Receive items (from In Transit status)

Follow the instructions below to mark an item as received.

**To mark an item as received:**

1. From the Borrowing Requests category, click **In Transit**.
2. Click the request **ID** or **Title** to display a request. **Note:** Request queues where batch processing is available include an icon in the left navigation sidebar.
3. Click **Mark as received**.
4. A confirmation message appears and the request appears under the category Borrowing Requests > Received > Received/In Use.

### Renew item (from Received status)

Follow the instructions below to renew a request item.

**To renew an item:**

1. From the Borrowing Requests category, click **Received**.
2. Click the request **ID** or **Title** to display a request.
3. Enter a **Desired due date**.
4. Click **Renew** item.
   
   **Caution:** When suggesting a desired due date, be sure to consult the lender’s renewal policies by scrolling down in the request form and clicking the **question mark icon** (❓) to open the lender’s Policies Directory profile.
5. A confirmation message appears and the request appears under Borrowing Requests > Received > Renewal Requested.

Note: Tags can be used to track requests and viewed in the Borrower renewal queues. See **Tags** for more information.

If the lender accepts the renewal request, they will determine the new due date. If you have selected to offset the patron’s due date, the offset date will display to the patron in the User Portal and in the notifications they receive. Please see **Patron Request Management** for more information about offsetting the patron due date.

If the lender denies the renewal request, the original due date will remain.
Mark a request as Lost

If a received item is missing, mark the request as Lost to alert the Lending library.

To mark an item as Lost:

1. From the Borrowing Requests category, click Received.
   - Items can be marked as Lost from the Received/ In Use, Renewal Requested, Renewal Approved, Renewal Denied, Overdue, and Recalled queues.
2. Click the request ID or Title to display a request.
3. Select Lost on the request detail screen.

The request status is updated to Lost and the request moves to the Received but Missing queue for both the borrowing library and the lending library.

If the item is recovered, return or renew the item. See Return items for more information.

Unfilled Requests

If a request is not filled by any of the lenders in the Lender String, the request will age to Unfilled. Options for Unfilled requests include Resend Request, Change Fulfillment Type, or Cancel Request.

To resend the request:

1. Click on the request ID of the unfilled request.
2. Under Lending Libraries, enter additional lenders into the Lender String.
   - The History appears below to indicate the lenders who have previously received this request and their response.
3. Optional. Edit the bibliographic data in the Request Details, Borrowing Notes, Billing Notes, or IFM Maximum Cost.
   - Search options appear for Title, Author, ISSN, ISBN, and OCLC Number fields.
   - The Preferred edition field is not editable.
4. From the request screen, click Resend Request.
5. The request will move to Awaiting Response.

You can change the Fulfillment Type of an unfilled request to a Purchase Request, WMS Acquisitions (if enabled) or Document Delivery (if enabled).

To change the fulfillment type of the request:

1. Locate the request you want to change.
2. In the request, click Change Fulfillment Type and select one of the following:
   - Document Delivery
   - Purchase Request

https://help.oclc.org/Resource_Sharing/Tipasa/Borrowing_Requests/Process_requests
Printed: Fri, 12 Jun 2020 19:35:27 GMT
• WMS Acquisitions

3. The request moves to the new fulfillment type queue.

**Respond to conditionals from lenders (from Produced status)**

Follow the instructions below to respond to conditionals.

**To respond to conditionals:**

1. On the left navigation, click **Borrowing Requests**.
2. Click **Conditional**.
3. On the Conditional screen, review the Conditions column to see the lender’s conditions.
4. Click the request **ID** or **Title** to display a request.
5. Respond to the Lender’s condition with **Yes**, **No**, or **Cancel Request**.
   - If you click **Yes**, the request returns to the Lender and appears under Lending Requests > Can You Supply? > Conditions Accepted.
   - If you click **No**, the request goes to the next Lender in the lender string.
   - If you click **Cancel Request**, the request is canceled.
6. A confirmation message appears.

**Watch a video**

**Borrower: Responding to conditionals (4:12)**

This video covers how a borrowing library respond to conditionals sent by lenders.

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**Watch a video**

**Requests: Expired, overdue, or unfilled (7:23).**

This video covers how to proceed with requests with the status of expired, overdue, or unfilled.

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