Managing Resource Sharing Borrowing Requests

To manage resource sharing borrowing requests, you must have one of the following roles:

- Fulfillment Services Operator (in the scope of a resource sharing library)
- Fulfillment Services Manager (in the scope of a resource sharing library)

This section describes how to manage resource sharing borrowing requests on the Resource Sharing Borrowing Requests page.

Workflow Actions

You can filter results using the Activity Status filter at the top of the page, where you can select to view All, Active, or Completed requests by default. If additional inactive filters have been enabled in Borrowing Requests Inactive Filters, those filter options display as well.

You can filter results using the facets on the left side of the page. The facets include:

- **Status** – Status of the borrowing request.

  There are statuses that indicate the final step in the request is done (terminal statuses). Requests in these statuses may be removed. The list of terminal statuses follows:

  - Cancelled by partner
  - Cancelled by patron
  - Cancelled by staff
  - Digitally received by library
  - Expired
  - Request completed - This is the final status before removal, and may be manually set. If the request is for an ISO partner, there must be a reply from the partner before the status will switch to Request completed.

  Non-terminal (intermediate) statuses in the request process are shown below:

  - Conditional
  - Created borrowing request
  - Damaged communicated – Appears only when Damaged communicated is enabled in the borrowing workflow profile. See Adding Workflow Profiles.
  - Declared lost by partner
  - Expired
  - Exported to third party
  - Externally obtained
  - Lender check in
  - Loaned item to patron
  - Locate failed
  - Locate in process
  - Lost communicated –Appears only when Lost communicated is enabled in the borrowing workflow profile. See Adding Workflow Profiles.
Mediated patron renewal
Overdue request
Pending approval
Physically received by library
Ready to be sent
Recalled by partner
Received – not for loan
Rejected by partner
Renew request not accepted
Renew requested
Renewed by partner
Report damaged item to partner – Same meaning as Damaged communicated.
Report lost item to partner – Same meaning as Lost communicated.
Request accepted
Request sent to partner
Returned by patron
Returned item to partner
Shipped digitally
Shipped physically
Waiting for cancel response
Will supply
• **Active Partner** – The active partner in a request rota
• **Creation Date** – Date on which the request was created. Possible values are:
  - **Today** – Requests created on the current date
  - **Yesterday** – Requests created on the day before the current date
  - **Up to three days ago** – Requests created two or three days before the current date
  - **Up to a week ago** – Requests created up to a week before the current date
  - **Up to a month ago** – Requests created up to a month before the current date
  - **Older** – Requests created more than one month before the current date
• **Update Date** – Date on which the request was updated. Possible values are the same as those for the **Creation Date** facet.
• **Requested Format** – The format of the requested item. Options are: **Digital**, **Physical**, and **Physical non-returnable**
• **Supplied Format** – The format in which the requested item was supplied. Options are: **Digital**, **Physical**, **Physical non-returnable** and **Undefined**
• **Due Date** – The date by which the item must be delivered. Possible values are the same as those for the **Creation Date** facet.
• **Last Interest Date** – The date after which the requester has indicated that they are no longer interested in the item
• **Need Patron Information** – Requests for which mandatory information has not been supplied by the patron
• **General Messages** – Requests which contain general messages of **Type = Received**. The operator may dismiss and activate general messages from the request's General Messages tab (see [Sending a General Message With a Resource Sharing Request](#)).
• **Owning Library** – The library which owns the requested resource
• **Active Notes** – The requests with notes marked as **Active** on the **Notes** tab.
• **Pickup Location** – Libraries, reading rooms, and personal delivery are all included in the facet
• **Level of Service** – The level of service assigned to the request.

**To manage resource sharing borrowing requests:**

1. Optionally configure the parameter `check_patron_duplicate_borrowing_requests`; see Configuring Other Settings.
2. On the Resource Sharing Borrowing Requests page (Fulfillment > Resource Sharing > Borrowing Requests), locate the requests you want to manage.

You can select any of the following tasks in the Tasks List in the persistent menu (see Tasks in the Task List) to open this page with the relevant filter preset:

- Borrowing requests - New - with no partner
- Borrowing requests - Overdue
- Borrowing requests cancelled by partner
- Borrowing requests recalled
- Borrowing requests returned by patron
- Borrowing requests with active general messages
- Borrowing requests with active notes

3. To add a request, select **Add** and select to add an item manually (Manually Adding a Request), from a search (see Adding a Resource Sharing Borrowing Task From a Search), or from an external resource (Adding a Request From an External Resource).

4. To manage a request, select the action for a request, as described in the following table:

<table>
<thead>
<tr>
<th>Link</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cancel</strong></td>
<td>Cancel the request. Appears only when:</td>
</tr>
<tr>
<td></td>
<td>◦ The request is still active</td>
</tr>
<tr>
<td></td>
<td>◦ The request does not have a status of <strong>Loan</strong></td>
</tr>
<tr>
<td></td>
<td>◦ The request has not been shipped</td>
</tr>
<tr>
<td></td>
<td>◦ No partner exists or the configured active partner supports the <strong>Cancel</strong> feature</td>
</tr>
<tr>
<td></td>
<td>When canceling a request, the request’s status becomes <strong>Canceled by staff</strong>.</td>
</tr>
<tr>
<td></td>
<td>You can also delete requests in Primo, on the My Account tab. When doing so, the borrowing request’s status becomes <strong>Canceled</strong>. If an item is on the hold shelf when canceled in Primo:</td>
</tr>
<tr>
<td></td>
<td>◦ The hold request is canceled</td>
</tr>
<tr>
<td></td>
<td>◦ The item moves to the expired hold shelf</td>
</tr>
<tr>
<td></td>
<td>◦ The request is marked as <strong>Completed</strong></td>
</tr>
<tr>
<td></td>
<td>For details on the Primo My Account tab, see My Account.</td>
</tr>
<tr>
<td></td>
<td>When a request is canceled, a message is sent to the patron. The letter is Ful Cancel Email Letter (letter code: FulCancelEmailLetter). To configure the message, see Configuring Alma Letters.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Check Out to Patron</strong></th>
<th>Marks that the patron received a physical non-returnable item and completes the request.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Conditional Reply</strong></td>
<td>When an ISO message is sent from the lender, the borrowing request changes to <strong>Conditional</strong> status, and the <strong>Date for Reply</strong> field is displayed. When selecting this action, a window is displayed to select <strong>Yes</strong> or <strong>No</strong> in response to the condition specified by the lender. If the response is <strong>Yes</strong>, the request status changes to <strong>Sent</strong> and <strong>Date for Reply</strong> field is cleared. If the response is <strong>No</strong>, the status changes to <strong>Rejected by Partner</strong> and continues to the next partner in the rota.</td>
</tr>
<tr>
<td>Link</td>
<td>Description</td>
</tr>
<tr>
<td>------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| **Damaged**      | Send an email to the lender (letter code: FulDamagedEmailLetter) and set the status to Damaged communicated. Appears only:  
  ° For email or ISO partners  
  ° When the request is received by the library (and not as ‘Physical non-returnable’) and has not yet been returned to the partner  
  ° When Damaged communicated is enabled in the borrowing workflow profile. See Adding Workflow Profiles.                                                                                                                                                                                                                                                                                                             |
| **Duplicate**    | Create a new request based on the existing one. You can then modify the request as required on the Resource Sharing Borrowing Request page. For details on the displayed fields on this page, see the Resource Information Fields table in Adding a New Book or Journal Article and Request Attribute Field table in Creating a Borrowing Request.  
  When duplicating a Resource Sharing Borrowing request, the values in the following fields are copied to the new request:  
  ° Title  
  ° ISSN, ISBN (Metadata fields)  
  ° Author  
  ° Requester  
  ° Owner  
  ° Request Status  
  ° Requested Format  
  ° Delivery Location  
  ° Request Note                                                                                                                                                                                                                                                                                                                                                      |
| **Edit**         | Modify the request in the Resource Information dialog box (see Editing a Borrowing Request).                                                                                                                                                                                                                                                                                                                                                                                                   |
| **Edit Shipping Cost** | This allows the user to update the shipping cost without opening the full edit form for the borrowing request. The option is also available for completed requests.                                                                                                                                                                                                                                                                                                                       |
| **Externally Obtained** | Sends a request using the GetItNow service. See Sending a Request for a CCC GetItNow Resource.                                                                                                                                                                                                                                                                                                                                 |
| **General Message** | Send a general message with a borrowing request to a lender (see Sending a General Message With a Resource Sharing Request).                                                                                                                                                                                                                                                                                                       |
| **Locate Resource** | Manually activates the Borrowing Locate process. This action only appears if the request has an assigned partner or rota. See Borrowing Locate Process.                                                                                                                                                                                                                                                                                    |
| **Lost**         | Send an email (letter code: FulLostEmailLetter) to the lender and set the status to Lost communicated. Appears only:  
  ° For email or ISO partners  
  ° When the request is received by the library (and not as ‘Physical non-returnable’) and has not yet been returned to the partner  
  ° When Lost communicated is enabled in the borrowing workflow profile. See Adding Workflow Profiles.                                                                                                                                                                                                                                                                                                             |
<p>| <strong>Reactivate Request</strong> | Select this option to reactivate a completed peer to peer resource sharing request. A temporary item is recreated using the previous barcode with the process status set to In resource sharing. The library and location of the item are set to the same values as when the item was initially created. If the item is not yet on loan, a hold request is reinitiated. You can reinitiate the loan manually. If no loan is initiated, the request status is Request Reactivated. The request's original external ID is maintained. |
| <strong>Reassign</strong>     | Reassign a task to another user (see Reassigning a Task).                                                                                                                                                                                                                                                                                                                                                                                                                                     |</p>
<table>
<thead>
<tr>
<th>Link</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recalculate Rota Assignment</td>
<td>To attach a rota to a request based on configured rota assignment rules, select the Recalculate Rota Assignment link to attach the rota to the request according to the configured rules (see Configuring Rota Assignment Rules). This process also performs a locate process automatically if the Automatically activate locate profile option is selected for this resource sharing library (see Configuring Parameters of a Resource Sharing Library).</td>
</tr>
<tr>
<td>Recall</td>
<td>Recall shipped items when a local hold request is placed for that resource. The recall function is applicable to both ISO and email partners. You can configure which loans are recalled first if the requested resource has both copies that were shipped to a remote borrower and copies loaned to local patrons. The parameter that controls this choice, <code>rs_prefer_recall_method</code>, defaults to False (see Configuring Other Settings). Changing it to True recalls the shipped item first, rather than the locally loaned copy. Recalls are supported if the borrowing workflow profile includes the Recall item action (see Configuring Workflow Profiles). In that case, borrowing requests display a new action, Recall. For more information about the recalling resource sharing requests, see the Resource Sharing Request Recalls video (7:33 mins).</td>
</tr>
<tr>
<td>Receive</td>
<td>Select a receiving format and enter a temporary barcode to enable receiving the resource (see Resource Sharing Partners). If the <code>generate_resource_sharing_temp_barcode</code> configuration setting is set to true, the temporary barcode is displayed automatically (see Configuring Other Settings). See Receiving Items.</td>
</tr>
<tr>
<td>Reject</td>
<td>Mark a request rejected by the lending institution as Rejected (see Rejecting a Borrowing Request). Reject is only visible if the workflow option Reject is enabled.</td>
</tr>
<tr>
<td>Release Assign (on the Assigned to Me tab)</td>
<td>Move the task from the Assigned to Me tab to the Unassigned tab.</td>
</tr>
<tr>
<td>Remove</td>
<td>Remove the request. Appears only when the request’s status is one of the following: ◦ Returned item to partner ◦ Request completed - The request was either delivered or canceled before it reached the hold shelf. ◦ Shipped digitally ◦ Canceled by partner ◦ Cancel requested</td>
</tr>
<tr>
<td>Renew</td>
<td>Renew a resource sharing borrowing request. A dialog box appears, where you enter a due date for the request and an optional note in the Internal note and/or Note to partner fields. For details on these fields, see step 3 in Rejecting a Borrowing Request. The request status is changed to Renewed by Partner. For more information, see Managing Borrowing Renewals. This option appears when Staff renewal is selected for lending requests in the Resource Sharing Lending Workflow Profile (see Configuring Workflow Profiles). If the request is renewed, a message is sent to the patron and a renewal fee may be charged. The letter is Ful Borrowing Info Letter (letter code: FulBorrowingInfoLetter). To configure the message, see Configuring Alma Letters. A resource sharing renew fee is set as part of a fulfillment policy; see Adding Fulfillment Policies. For more information about requesting renewal of a borrowing request, see the ISO ILL: Request Renewal video (10:06 mins).</td>
</tr>
<tr>
<td>Request Renew</td>
<td>Renew a resource sharing borrowing request under the following conditions:</td>
</tr>
<tr>
<td>Link</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>A Resource Sharing Lending Workflow Profile exists with <strong>Staff Renewal</strong> enabled.</td>
<td></td>
</tr>
<tr>
<td>The partner is not part of a fulfillment network.</td>
<td></td>
</tr>
<tr>
<td>The item has arrived.</td>
<td></td>
</tr>
<tr>
<td>The item has not been returned.</td>
<td></td>
</tr>
<tr>
<td>A dialog box appears, where you enter a due date for the request and an optional note which displays in the <strong>Notes</strong> tab page of the request.</td>
<td></td>
</tr>
<tr>
<td>If the Resource Sharing Lending Workflow Profile has the <strong>Renewal Response</strong> and <strong>Staff Renewal</strong> options selected, the request status is changed to <strong>Renew Requested</strong>. For details on workflow profiles, see Configuring Workflow Profiles.</td>
<td></td>
</tr>
<tr>
<td>If the request is renewed, a message is sent to the patron and a renewal fee may be charged. The letter is Ful Borrowing Info Letter (letter code: FulBorrowingInfoLetter). To configure the message, see Configuring Alma Letters. A resource sharing renew fee is set as part of a fulfillment policy; see Adding Fulfillment Policies.</td>
<td></td>
</tr>
</tbody>
</table>

**Note**

If **Renewal Response** was not selected for the workflow profile, the request is automatically renewed after selecting the **Request renew** link; the request's status is **Renewed by partner**, and the **Renew** link does not appear.

This option appears for requests with a **Received** status.

<table>
<thead>
<tr>
<th>Resend Patron Email</th>
<th>For digital requests with document delivery, the email may be resent may be resent to the patron.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Return</td>
<td>Appears when the request is received by the library (and not as 'Physical non-returnable') and has not yet been returned to the partner. If the borrowing Workflow Profile for the partner includes the <strong>Lender check in</strong> option, the request status is changed to <strong>Returned item to partner</strong> (see Configuring Workflow Profiles).</td>
</tr>
<tr>
<td></td>
<td>The Resource Sharing Return Slip Letter (letter code: ResourceSharingReturnSlipLetter) is printed when returning a borrowing item to the lender. For more information, see Configuring Alma Letters.</td>
</tr>
<tr>
<td></td>
<td>For more information about the returning items to the lender, see the ISO ILL: Lender Checked-in Message video (8:35 mins).</td>
</tr>
<tr>
<td>Send</td>
<td>Appears only when an ARTEmail or ISO partner is configured. Opens the Resource Sharing Borrowing Parameters page, where you configure details to be sent to the partner (see Sending a Borrowing Request). The parameters displayed are those selected for the partner during the partner configuration process (see Resource Sharing Requests).</td>
</tr>
<tr>
<td>Send Query to Patron</td>
<td>Display the query types configured on the Patron Query Types Code Table page (see Configuring Patron Query Types). The Select email template dialog box appears to select the email template you want to be used for the query. The dialog box also contains a Note to Patron field for a free text note to be included on the Query to Patron letter (QueryToPatronLetter). If there is only one template type of Query to Patron, the dialog box will appear with just the Note to Patron field available for input. For details on system behavior when selecting this option, see Configuring Patron Queries.</td>
</tr>
<tr>
<td>Status Query</td>
<td>Request a status update from the lending institution. This is only applicable to ISO partners.</td>
</tr>
<tr>
<td></td>
<td>The returned borrower ISO status is recorded in a note. Each ISO status corresponds to the following Alma request statuses:</td>
</tr>
<tr>
<td></td>
<td>◦ Not supplied - Rejected by partner, Locate failed, Canceled By Patron, Expired</td>
</tr>
<tr>
<td></td>
<td>◦ Pending - Created borrowing request, Request sent to partner, Ready to be sent, Locate in process, Will Supply, Pending Approval</td>
</tr>
</tbody>
</table>
You can perform actions on multiple requests simultaneously using the following actions:

- **Change Status** – Select the requests, select a status, and select **Change Status**.

  **Note**
  
  When the status of a request is changed from **Report lost item to partner** or **Report damaged item to partner** to **Completed**, the temporary item is removed and the loan is closed.

- **Remove Requests** – Select the requests and select **Remove Requests**. The requests are removed from Alma. After the request is deleted, it is viewable only in analytics.

### Reassigning a Task

You can reassign a task only if you are assigned the task or if it is unassigned. A user with a Fulfillment Services Manager role additionally has access to the **Assigned to Others** tab, where that user can manage all requests, regardless of their assignment.

**To reassign a task:**

2. From the Assign to drop-down list, select an operator.
   The list of operators includes only those users who have the Fulfillment Services Operator role.
3. In the Note field, enter notes, as needed.
4. Select the Send as e-mail check box to notify the operator of the new assignment.
5. Select Assign To.

---

**Sending a Query to the Patron**

Depending on the configured patron query templates settings (see [Configuring Patron Queries](#)), one of the following occurs:

- If you are using patron query templates, and there is only one template, and if **Edit if Single** is set to true, the Email Message dialog box opens. This is where you configure a message to send to the patron by email.

   ![Email Message Dialog Box](image)

   **Email Message Dialog Box**

   - The **Subject** field contains the External Identifier of the request (if one exists).
   - The **Body** field contains text relating to the requested resource. You can update the text in this field, as needed. Enter the text for the patron by replacing the string [please enter your query here] under Query to patron:

     ![Email Message](image)

     **Email Message**

     - From: nesoumlignie.such.mail.com
     - To: nesoumlignie.such.mail.com
     - CC: 
     - Subject: Your request (0Y0PARTNER@001081G):
     - Body: Dear Sir/Madam,

     Regarding your request (0Y0PARTNER@001081G):

     Format: Book
     Title: Cables, cause, treatment and prevention / by Russell L. Cecil .
     Author: Cecil, Russell L.
     Publisher: G Appleton and company
     Publication Date: 1925.
     Place of Publication: New York, London :

     Date: 2017/05/21

     Modify the contents of the email message as needed, and select Send Email.

   The actions that can be performed on this page are determined by the status of the request, and the workflow profile configured for the partner.

   For details on configuring workflow profiles, see [Workflow Profiles](#).

   For details on borrowing resource requests activities, see [Managing Resource Sharing Borrowing Requests](#).
• If you are using patron query templates, and there is only one template, and **Edit if Single** is set to false, the query is immediately sent.

• The query is also sent immediately if you are using patron query types and there is only one type defined.

• If you are using patron query templates and there is more than one template – The Select Email Template dialog box appears, where you select the template you want to use.

![Select E-Mail Template Dialog Box](image)

Select **Open** for Edit to edit the contents of the message before sending it, or select **Send Email** to send the query immediately, without editing its content.

The dialog box also appears if you are using patron query types and there are multiple types defined. In this case, only the **Send Email** button appears.

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**Sending a General Message With a Resource Sharing Request**

You can send a general message with a resource sharing borrowing or lending request. The message appears on the request's **General Messages** tab when selecting **Edit** or **View** for the request.

General Messages can be sent only if:

• The request is an ISO or NCIP-P2P request.

• The request has already been sent (this limitation is for borrowing requests only)

Additionally, there is a **General Messages** facet, which enables you to filter requests by those containing active general messages.

For more information about sending a general message with a resource sharing request, see the [ISO ILL: Send General Message](#) video (2:43 mins).

The following procedure describes sending a General Message with a borrowing request to a lender. A General Message can also be sent from a lending request to a borrower in the same manner.

**To send a general message with a Resource Sharing request:**


**Note**

The **General Message** link also appears on the Resource Sharing Lending Requests page for ISO and NCIP-P2P requests.
2. In the **Message** field, enter a message and select **Send**. The message is sent to the lender using the General Message Email letter (letter code: GeneralMessageEmailLetter). The request is limited to 1,000 characters.

3. On the Resource Sharing Lending Requests Task List page (**Fulfillment > Resource Sharing > Lending Requests**), locate the message with the external identifier belonging to the Borrowing request message, and select **Edit**. The Resource Sharing Lending Request page opens.

4. Select the **General Messages** tab. The General Messages page appears, and the general message sent by the borrower appears in the table with **Type = Received**.

5. When the message has been noted or acted upon, select **Dismiss** to remove the message from the page. The **Dismiss** button appears only for messages with **Type = Received**.

You can view requests that have received messages (messages of **Type = Received**) that are active by selecting the **Active General Messages** link in the General Messages facet on the left side of the Resource Sharing Lending Requests Task List or Resource Sharing Borrowing Requests page.

You can also access active general messages by selecting either the **Lending request with active general messages – unassigned** or the **Lending request with active general messages – assigned to you** links on the Tasks list.

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**Viewing Local Resources on a Borrowing Request**

If local resources exist but a borrower creates a resource sharing request, you can view the local resources for the request. Viewing the local resources can be done while creating the resource sharing request, or after the request has already been created. In either case, the operator may decide to place a local hold request on the matching local resource. If this is done within the process of creating the resource sharing request then the resource sharing request will not be created.

**To view matching local resources while creating a resource sharing request:**

1. Enter a borrowing request. If the requested item already exists in the local institution, the self-ownership pop-up appears.
2. Select **View Local Resources** to bring up a listing of the matching local resources.

3. Select **Request** from the local item to abort the borrowing request and create a local request. A confirmation message appears.

4. Select **Confirm Request** on the resource listing (**Local Resource List**) or **Confirm** on the self-ownership pop-up (**Self-ownership Pop-up**) to continue with the creation of the borrowing request rather than place a local hold request. The request appears in the Resource Sharing Borrowing Requests List. The local resources can still be accessed from this point. Each request has a link to **View Local Resources**.

5. Select **View Local Resources** to return to the resource listing (**Local Resource List**). You can still create a local request even though the resource sharing request has already been placed. Select **Request**, and select **Confirm** in the confirmation dialog box.

---

### Viewing Borrowing Request Actions

The **Audit** tab displays the actions taken on resource sharing borrowing or lending requests, such as changing the request’s status or adding a shipping cost. The Audit tab is available when editing a resource sharing request.

The Audit tab may be viewed in full mode or in brief mode. You can configure what type of lines will display in brief mode.

**To view resource sharing borrowing and lending request actions:**


2. Select the **Audit** tab. The Audit tab page displays the list of actions performed on the resource sharing borrowing or resource sharing lending request. The view mode may be selected (**Brief** or **Full**) from the drop-down list in the **Audit** tab. The full option will display all audit records for the request. The brief option will display only those enabled in the configuration page, **Brief Audit Fields** (see [Configuring Brief Audit Fields](#)).
Rejecting a Borrowing Request

You reject borrowing requests that have been rejected by the lending institution. Requests are rejected for a variety of reasons. For example, if an item is already on loan or is not found in the library, it is rejected by the lending institution, and you can mark it as rejected at the borrowing institution.

To reject a request in the borrowing institution, select **Reject** from the row actions list of a borrowing requests. The reject action also appears in the **Rota** tab of the request and in the list of actions available on the pull down menu at the top of the borrowing requests page.

There is a lending workflow option, **Reject**, that controls whether the reject action appears on the action list of the request and on the rota tab. The option is enabled by default and will allow the reject button to be visible. If the workflow option is disabled, the reject action will not appear. Reject will still be an option on the pull down menu, but selecting it while the workflow action has been disabled will cause an alert to appear at the top of the page and the reject action will not be executed. Hiding the reject action may be especially useful for ISO requests, where the rejection is expected to be received as a message sent by the lender.

The **rs_keep_rejected_request_active** customer parameter determines if a request stays in an active status even after it is rejected by a partner. When the parameter is set to **None**, which is the default, the request will be completed and will not be visible in the active requests queue. Alma will also send a cancelation message to the patron. When the parameter is set to **Borrowing** or **Both**, the request will remain in the active requests queue so the staff librarian will have the option to work on the request. With this setting, Alma will not send a cancelation message to the patron. This functionality applies only to rejections that occur after the parameter is changed. For more information, see [Configuring Other Settings (Fulfillment)](Fulfillment).

To mark a request as rejected by the lending institution:

2. Select a reason for the rejection in the **Reject reason** field.

3. Optionally, add a note in either or both of the following fields: This note appears in the following format: `<Name of partner><Note text>`
   - **Internal note**: A note that appears only on the side from which it is sent (that is, when configuring a note from the borrower, the note appears only in the list of borrowing requests. When configuring a note from the lender, the note appears only in the list of lending requests). These notes do not appear on the Audit tab, and are to be used for notes not intended to be publicized (that is, they are not sent to the peer partner). An example of a note would be a borrower writing, **This lender has historically been difficult to deal with**.
   - **Note to partner**: The note that is sent to the partner. This note appears in the **Notes** tab of both the sender of the note and the receiver of the note, and on the request’s **Audit** tab (i.e. – **Only in reading room**).

4. Optionally, select **Notify user** to send a notification to the requesting patron regarding the rejection.

5. Select **OK**. The request's citation status changes to **Rejected the borrower request**, and the **Reject reason** and **Reject note** are displayed in the Notes tab for the request. (Select the **Edit** link for the request to view the Notes tab. You can also select **Borrowing requests with active notes** from the Tasks list. This link leads to the Resource Sharing Borrowing Requests page, filtered by **Notes from Partner**.)

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### Managing an Overdue Borrowing Request

Alma automatically marks ISO and email lending requests whose due date has arrived as **Overdue request**. In addition, Alma automatically sends ISO and email messages about these requests to the borrower. When using ISO, Alma automatically updates the borrower’s request status based on this message.