

# How to Process Borrowed Peer to Peer (P2P) Items

This workflow explains how to process books borrowed from partnering Peer to Peer (P2P) libraries.

Thank you George Washington University for sharing your workflow processes.

## When to Reference This Document:

- When books arrive via delivery or mail from partnering P2P institutions.
- When processing newly received items so they can be placed on the hold shelf for WRLC patrons.
- When returning borrowed item to partnering P2P institutions.
- When ensuring paperwork, routing slips, and Alma request metadata all match.

## Required Roles

- Fulfillment Operator
- Circulation Desk Manager

## Part I: Incoming Books

### 1: Verify Paperwork and Item Barcode

- Locate paperwork inside the P2P-loaned item
- Confirm barcode on book matches the barcode on the accompanying paperwork

**2: Open Receiving Items** Navigate to Fulfillment > Resource Sharing > Receiving Items>

**3: Enter the External Identifier** Locate the External Identifier information provided on the paperwork and click <OK>.

< Received Items Cancel

Identifier type  Barcode  External identifier

Received format  Physical  Digital  Physical non-returnable

Automatically notify patron

Internal note

Note to partner

External Identifier

No records were found.

**Note:** Ex Libris identifies the External Identifier as the primary matching key between the item and the borrowing request.

**4: Assign a Temporary Barcode** The temporary barcode ties the physical item to the local inventory system while maintaining the lending institution's original barcode.

- A pop-up will appear prompting for a Temporary barcode.
- Enter the item's actual barcode.
- Click <Save>

The screenshot shows the 'Receive Items' form in Alma. The form is titled 'Receive Items' and contains the following fields and values:

- Title: Extra bold : a feminist inclusive anti-racist nonbinary field guide for graphic designers /
- External identifier: 01WRLCGWA0234037
- Item policy: Borrowed from SUNY
- Fulfillment note: (empty)
- Due date: 06/29/2025
- Fund: (empty)
- Patron Receive Cost: 0.00 USD
- For Reading-Room Use Only:
- Multiple items:
- Temporary barcode: 30237006295697 (highlighted with a red box)
- Automatically print slip:  Yes
- Location: Borrowed from P2P Partner
- Internal note: (empty)
- Shipping cost: 0.00 USD
- Patron Request Cost: 0.00 USD

The 'Save' button is highlighted with a red box and a red arrow pointing to it.

**5: Print the Book Slip** After saving, Alma generates the Resource Sharing Receive Slip (if Quick Printing is enabled); Click <Print>

**6: Prepare the item for the Hold Shelf** Follow your libraries' procedures to prepare the item for the Hold Shelf

- **Note GW Procedures:** Create the Hold Strap
  - Cut the printed slip lengthwise to form a strap.
  - Tape it around the item's cover so the patron name and Hold Until Date are visible.

**7: Place Item on the Hold Shelf** Follow your libraries' Hold Shelf procedures to shelve the incoming item for patron pickup.

## Part II: Returning Books

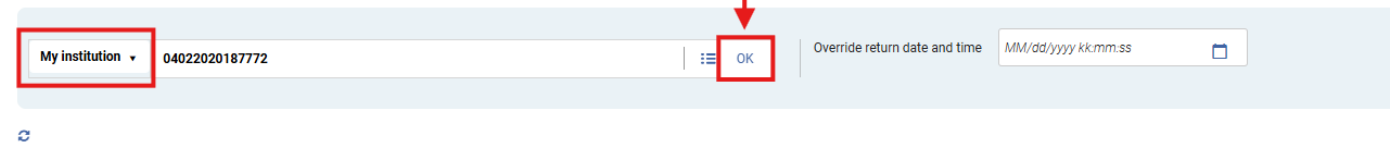
**1: Open Return Items** Navigate to Fulfillment > Checkout/Checkin> Return Items>

**2: Scan the Item Barcode** Ensure My Institution is selected and Scan the item barcode

- Select <OK>

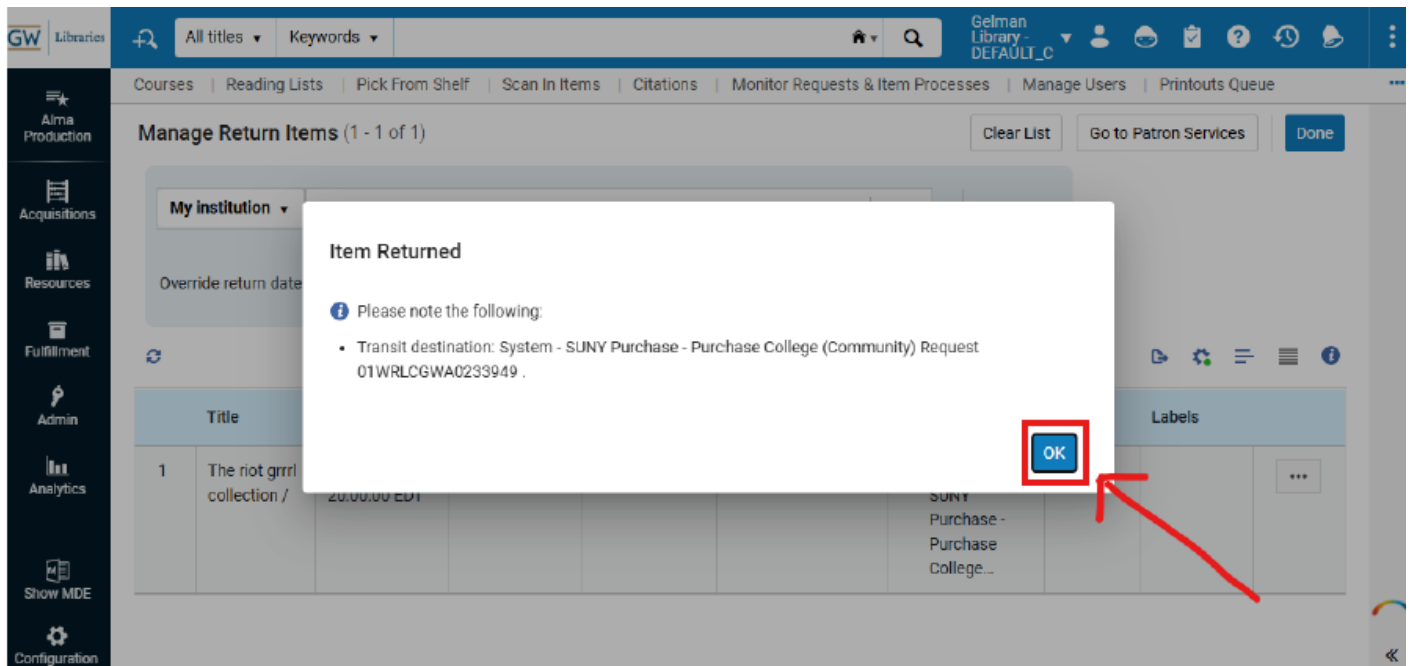
**Note:** Be sure to not use the External Identifier

#### Manage Return Items



My institution ▼ 04022020187772 | OK | Override return date and time MM/dd/yyyy kk:mm:ss

**3: Confirm Transit Destination** Alma displays a pop-up indicating Transit Destination to the lending partner; Click <OK>



Item Returned

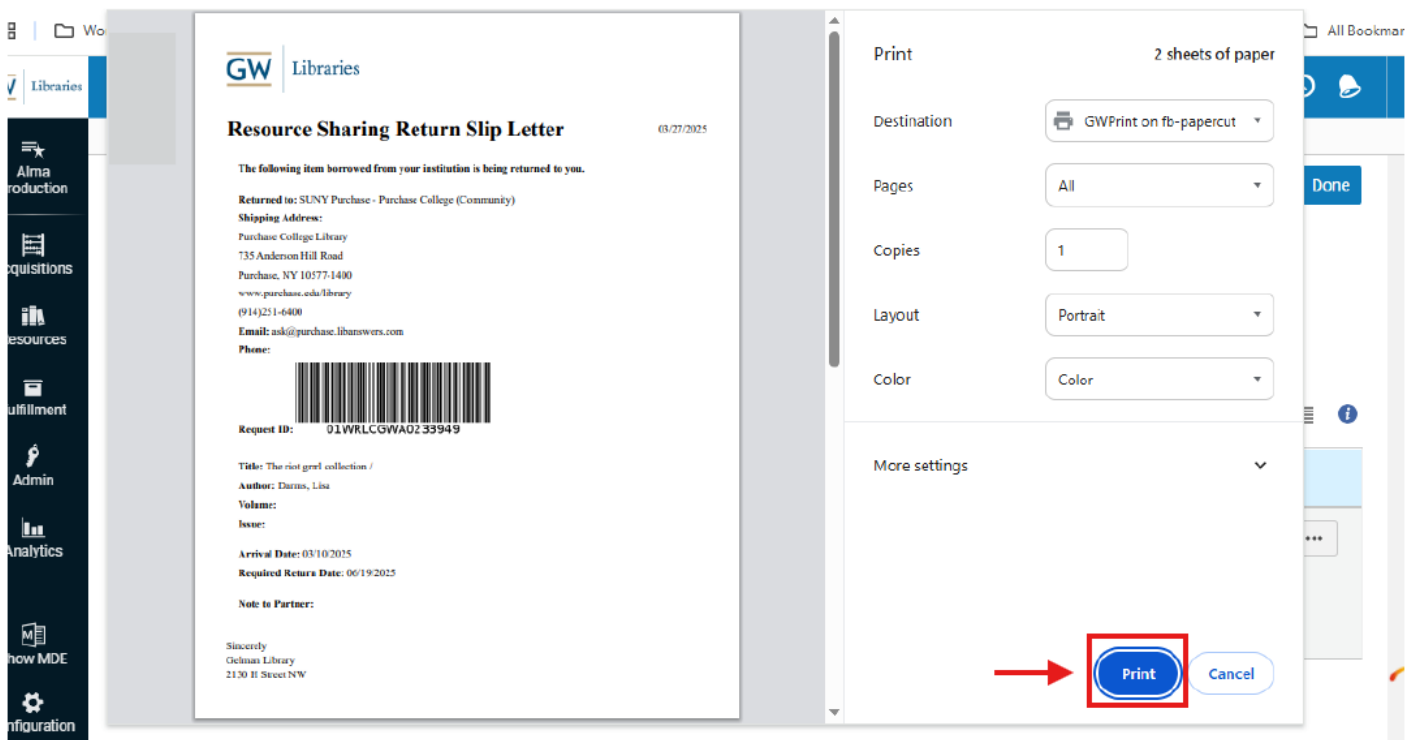
Please note the following:

- Transit destination: System - SUNY Purchase - Purchase College (Community) Request 01WRLCGWA0233949 .

OK

**Note:** This step triggers Alma's Resource Sharing workflow to update to In Transit for the lending library- acknowledging transit is essential for accurate tracking.

**4: Print the Return Slip** If you have enabled Quick Printing, Alma should automatically generate the "Resource Sharing Return Slip Letter; Click Print.



**5: Prepare the Item for Shipment or Shelf Routing** Insert the printed slip into the item. Follow your libraries' mailing procedures

## Frequently Asked Questions

- *What is the External Identifier and why is it important?*
  - It links the borrowing request to the item; Ex Libris defines it as an essential Resource Sharing match point.
- *Why must the item barcode match the paperwork?*
  - Alma uses the barcode to create the temporary item record and maintain lending consistency.
- *What happens if I scan the wrong barcode when returning an item?*
  - Alma will fail to match the item to the correct P2P request; Rescanning and verifying identifiers can help ensure correct matches
- *Why is Quick Printing recommended?*
  - It minimizes misrouting, aligns with Ex Libris slip workflows, and ensures slips print automatically at each step.
- *Do we need to keep both borrowing and lending slips?*
  - No. Use only the slips generated *during the current Alma workflow step*.
- *What if Alma does not generate a slip?*
  - Verify Quick Printing is enabled and that a default printer is available. Check Fulfillment > Configuration > Printing>.
- *Can we reuse previous P2P pull slips?*
  - Discarding old slips because request data changes after each workflow stage.
- *Why is the Transit Destination message important?*
  - It confirms the item has moved to the correct stage in the Resource Sharing lifecycle.

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