Alma Essentials: Fulfillment

SETS AND JOBS

Hello, In this tutorial you will learn how to create fulfillment sets and run jobs.

For more information about what sets and jobs are, and how to apply them batches of records please watch the tutorials in the Knowledge Center. It is also recommended that you watch the other fulfillment training sessions, so you have an understanding of the terminology used in this tutorial.

There are several fulfillment related jobs, and you must have the Fulfillment Manager role to run them.

- Cancel Physical Item Requests
- Change Loan to Claimed Returned
- Close Lost Loans
- Create Physical Item Work Orders
- Cancel Physical Titles Requests

You need to cancel requests on current loans that are lost. To create the set, go to Fulfillment > Create Fulfillment Sets.

On the Manage Fulfillment Sets page, the only required fields are the name and description. You can filter by loan status, as well as the due date and status date. Once you've entered all your information, click save and the set will be created automatically.

Please note that this set can only be created for active loans.

To run the job on the set of items you just created you'll go to Admin > Run a Job. You can either search for or use the filters to find the job, in this case you'll use the filter by "Request"… choose "Cancel physical titles request"… and then click "Next".

On the next page you'll be prompted to select which set to apply the job to, and then click "Next" again.

You'll choose a cancellation reason, in this case the item is missing. When you're done click "Next" and confirm the job.