

Alma Essentials: Fulfillment

CREATING PHYSICAL ITEM REQUESTS

Hello, in this tutorial you will learn how to create a physical item request for a patron as well as search and view active requests; and generate pick slips

You have a patron who would like to borrow a particular item. They have the bibliographic information but have not been able to submit a request.

To submit a request on behalf of a patron you'll use the persistent search bar to search "All Titles", this will allow Alma to select the most appropriate copy of the item to fulfill the request. If you were to choose "Physical items", the request will be submitted for a specific copy.

Once the page loads, you can further refine your results using the facets or advanced search functions. Here's the title, so you'll click the row action tool for the item and select "Request".

In the "Request Type" menu, you'll select "Patron physical item request", and you'll then be prompted to enter in additional information for the request. The only required fields are the "Requester" and "Pickup At" fields. Let's enter our patron's barcode... and select "Main Library".

Additional Request Attributes can be added, such as if the patron needs the item by a particular date. Please note that by adding request parameters Alma may not be able to fulfill the request due to the lack of available items.

When you're done click "Submit". The request has now been submitted on behalf of your patron.

If the item is currently in place on the shelf, it must be retrieved by library staff and scanned in at the local circulation desk. Depending on the pickup location specified, the item will either be placed on the hold shelf or put in transit to pickup location.

Another patron has come up to the desk and would like to know the status of a requested item. To search for a specific request you can use the persistent search bar. Select "Requests" and then "Requester". Enter the patron's name and click search.

And here's Sarah's requests.

Request details such as place in queue, workflow step, and expiration date are on this screen

You now need to get a list of items that need to be picked from the stacks. You'll go to Fulfillment > Pick from Shelf... or if you have the Requests Operator role, you can click the "Tasks List" icon, here, and select the correct task.

Requests can be filtered using the facets, we only want to see patron physical item requests. Now we need to generate pick slips to help identify the shelf location when retrieving the item. Each pick slip contains the Request ID, location, and call number. There are a few ways to create the pick slips.

First, you could individually click "Print Slip" for each item that needs to be retrieved.

Second, by printing slips in batch. Click the checkbox for each request or choose "Select All", then select "Print Slip" from the actions menu and click "Execute".

Lastly, you can click "Print Slip Report" to export either an Excel or XML file to download and either print or email as needed.