

Alma Essentials: Fulfillment

MOVE REQUESTS

Hello, in this tutorial you will learn what move requests are and how to create requests.

There are two types of move requests: permanent and temporary.

A permanent move request is used to move a physical item from one location to another, either within the same library or to a different library for an indefinite amount of time. Upon completion of the request the library and location fields in the holding record to which the item is attached are updated.

A temporary move request works similarly except that it is only for a specified amount of time. Upon completion of the request, the temporary library and location fields in the item record are updated. However, when the specified return date arrives, Alma creates a “restore” request to move the item back to its permanent location. At that time the item will appear in the Pickup from Shelf list.

The process to create a move request is very similar to creating a patron hold request.

A move request can be made at the title or item level. When a request is placed at the title level any item is a potential candidate to fill the request. Additionally, if multiple copies of a title need to be moved, you can create a single title-level move request and note how many copies of the title need to be moved. If you place the move request at the item level the request is for that single item.

You need to create a move request for a couple of copies of a title to be transferred to a new location, so you’ll search for the title using the persistent search bar. Once you find the title, open the row action tool and select “Request”.

In the “Request Type” dropdown, there are options to either select “Move permanently” or “Move temporarily”. After being selected, the screen will refresh with additional corresponding fields.

Let’s choose “Move permanently” and then a destination library, and the number of items that should be moved. Now you can select the location at the library you just chose in the “To” field. When you’re done, click “Submit”.

The request was successfully submitted.

You now need to create a move request for specific item for a display at another library. You’ll search for the item in the persistent search bar, and then open the row action tool for the item and select “Request”.

You’ll select “Move temporarily” as this is only for a display. There is no option to choose Number of Copies to move since this request is on a single item record. If that item can not be found on shelf the request will not be fulfilled. And since this is a temporary move you’ll have the option to choose a “Due Back” date, which is when Alma will automatically create a request to restore the item to its permanent location.

When you’re done, click “Submit”... and the request has now been created.

Please note that move requests can also be created in batch for a set of items using the “Create physical item move requests” job. For more information about jobs please watch the Fulfillment Sets and Jobs tutorial video.