Requests in Alma

A resource request (or just "request") is for the acquisition, manipulation, movement, or processing of inventory. Requests are entered into Alma before they are fulfilled: an active request is one that was entered into Alma and is some stage of processing; a rejected, completed, or expired request is no longer in process.

Both active and inactive rejected requests appear in reports, although inactive requests cannot be retrieved in the Alma UI. For more information, see Filtering Results Using the Active Request Flag.

Requests can be entered by patrons using a fulfillment system, such as Primo. Requests can also be entered manually into Alma by librarians or generated internally by Alma. Many requests create a workflow process and/or a task in the Tasks list (see Tasks in the Tasks List).

Request Types

Alma handles many types of requests. Some request types described below may not be available at your institution, and additional ones (work orders) may be defined by your administrator. The following table describes all the types of requests that you may encounter in the course of handling fulfillment.

<table>
<thead>
<tr>
<th>Request Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acquisition Technical Services</td>
<td>A work order request to perform some kind of technical service, for example copy cataloging.</td>
</tr>
<tr>
<td>Active</td>
<td>A request that is in process.</td>
</tr>
<tr>
<td>Binding</td>
<td>A work order request to fix a physical item.</td>
</tr>
<tr>
<td>Booking</td>
<td>A patron request to reserve a resource (such as a room or a book that cannot be checked out) for a specific time period.</td>
</tr>
<tr>
<td>Borrowing</td>
<td>A resource sharing request placed by a local patron and fulfilled by another institution. Implemented as an ILL outgoing request.</td>
</tr>
<tr>
<td>Completed</td>
<td>A request that was fulfilled successfully.</td>
</tr>
<tr>
<td>Department</td>
<td>Any request managed by a particular department.</td>
</tr>
<tr>
<td>Digitization</td>
<td>A work order request for digital copies of a physical or electronic resource. This is typically used to make a copy of a book chapter or an article for a patron or a group of students, and may require copyright clearance. The types of digitization requests are:</td>
</tr>
<tr>
<td></td>
<td>• Electronic - A digitization request for an electronic resource.</td>
</tr>
<tr>
<td></td>
<td>• Physical - A digitization request for a physical resource.</td>
</tr>
<tr>
<td></td>
<td>• Library Physical - A digitization request for a reading list citation associated with a physical item. The request is initiated by library staff. The librarian is asked to fill out copyright clearance information.</td>
</tr>
<tr>
<td>Request Type</td>
<td>Description</td>
</tr>
<tr>
<td>--------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Patron</td>
<td>A digitization request made on behalf of a patron. The patron may have been asked to sign a copyright declaration.</td>
</tr>
<tr>
<td>Staff</td>
<td>A digitization request (unrelated to a reading list citation) that is initiated by library staff. The librarian is asked to fill out copyright clearance information.</td>
</tr>
<tr>
<td>Expired</td>
<td>A request that was not fulfilled and is now past its date (is no longer relevant).</td>
</tr>
<tr>
<td>External</td>
<td>A request to locate a resource originating external to Alma, such as a request from Primo. This is not a resource request (but is included here for completeness). For information, see Discovery Interface Display Logic.</td>
</tr>
<tr>
<td>Fulfillment</td>
<td>A request within an institution, as opposed to a resource sharing request.</td>
</tr>
<tr>
<td>General</td>
<td>A patron request to reserve a resource for pickup at a certain location (for bibliographic records with holdings but no items).</td>
</tr>
<tr>
<td>Hold</td>
<td>A patron request to reserve a resource for pickup at a certain location (for bibliographic records with holdings but no items).</td>
</tr>
<tr>
<td>Internal</td>
<td>See library.</td>
</tr>
<tr>
<td>Lending</td>
<td>A resource sharing request placed by another institution's patron and fulfilled by the local institution. Implemented as an ILL incoming request.</td>
</tr>
<tr>
<td>Library</td>
<td>Any internal request, typically generated by another request. For example, a borrowing request might generate a move request, which is a type of library request.</td>
</tr>
<tr>
<td>Move</td>
<td>A library or internal request to temporarily or permanently move an item from one library/shelf to another.</td>
</tr>
<tr>
<td>OpenURL</td>
<td>An external request for information about a resource made by Alma's OpenURL link resolver. Not a resource request.</td>
</tr>
<tr>
<td>Patron</td>
<td>Any request made on behalf of a patron. The request can be made by the patron on Primo or by the librarian in Alma.</td>
</tr>
<tr>
<td>Pending</td>
<td>A request that is on the request queue but not yet active (its status is Ready).</td>
</tr>
<tr>
<td>Physical Item</td>
<td>A patron request to check out a physical item.</td>
</tr>
<tr>
<td>Purchase</td>
<td>A request to acquire a physical title or a license to an electronic title. See Purchase Requests.</td>
</tr>
<tr>
<td>Recall</td>
<td>A workflow step requesting that an item be returned to the institution. For more information, see Recall Requests.</td>
</tr>
<tr>
<td>Rejected</td>
<td>A request that was denied.</td>
</tr>
<tr>
<td>Resource</td>
<td>A generic term for any fulfillment or resource sharing request. This may be for a item that can be checked out, like a book, a technical services request to bind an item, or a request to reserve a room or a piece of equipment.</td>
</tr>
<tr>
<td>Resource Sharing</td>
<td>A request by a patron in one institution fulfilled by another institution, as opposed to a fulfillment request.</td>
</tr>
<tr>
<td>Restore</td>
<td>A move request to return an item in a temporary location to its permanent location.</td>
</tr>
<tr>
<td>Ship</td>
<td>A request to ship an item, either physically or digitally (by email).</td>
</tr>
<tr>
<td>Transit for Reshelfing</td>
<td>A restore request for an item that was returned after a lend request.</td>
</tr>
</tbody>
</table>
Request Type | Description
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Work Order | A request to perform an action on a physical item, such as digitize or bind (fix) the item. A work order sends an item to the work order department that can handle it, which then returns it to its location when it is done.

Work orders are defined on the Work Order Types page. A work order can go through several stages; in each stage, the work order has a status, called a process type. For example, a binding request can have the process types Sent to Bindery, Binding Prep, In Process, and so forth. Process types are defined on the Work Order Type Statuses page; see Configuring Work Order Type Statuses. Also see Configuring Request Task Names.

Booking Requests

Booking items in Alma reserves resources for a patron that are to be used during a specified time frame. For example, if a researcher has located important resources in a library’s catalog and can be at the library only during a specific time, the researcher can create a booking request to reserve those resources for that time. This provides exclusive rights to the materials reserved while the researcher is physically at the library, thereby making maximum use of his or her limited time frame.

Booking resources can also be used for high-demand items with a limited number of copies. For example, resources moved to a course-reserved area can be configured to be requestable using booking requests, usable for a set time period before the item must be returned. For more information, see Booking.

For more information about Booking, see Booking Requests in the Alma Essentials Training Kit.

Pages for Managing Requests

You can search for many types of requests using the persistent search box that appears at the top of every page; see Searching in Alma.

Alma includes several pages that display or enable you to work on requests, depending on your user role and your department. To change your department, see Library/Desk Selector in The Persistent Menu. Many of the pages below can also be reached by selecting a task in the Task List; see Tasks in the Tasks List.

<table>
<thead>
<tr>
<th>Page</th>
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<th>Request Types</th>
<th>Roles</th>
<th>Description</th>
<th>More Information</th>
</tr>
</thead>
</table>
| Active Hold Shelf Items | Fulfillment > Resource Requests > Active Hold Shelf Items | Physical Item, Requests Operator, Operator | | After an item that was requested by a patron is picked up from the stacks, it is sent to the hold shelf at the circulation desk. From the moment the item arrives at the hold shelf until the request has expired or it is removed, it is considered to be on the active hold shelf of the circulation desk. On this page, you can:  
  - Change the order of multiple requests for the same item using a queue  
  - Cancel the request | Managing Active Hold Shelf Items |
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</table>
| Approval     | Approval Requests List                                              |               |                              | • Extend the request to a later time or date  
• Mark the item as missing                                                                                                                                                                                     |                   |
| Requests     | Fulfillment > Resource Requests > Approve Digitization Requests      |               | Fulfillment Services Operator | You must approve or reject digitization when digitization rules determine that approval is required or when a copyright approval task is specifically requested, such as for a citation.  
On this page, you can:  
• Add copyright clearance information  
• Approve the request  
• Reject the request  
• Extend the request to a later time or date | Approving/Rejecting a Request for Digitization |
| Create       | Several ways. For example: search the repository and select Request beneath a physical item or title in the results. | Booking       | Fulfillment Services Operator | You can create a request on an item, typically on behalf of a patron or a staff member.  
On this page, you can:  
• Create a request                                                                                                                                                                                            |                   |
| Request      | Fulfillment > Resource Requests > Expired Hold Shelf Items           | Physical Item | Fulfillment Services Operator | After an item that was requested by a patron is picked up from the stacks, it is sent to the hold shelf at the circulation desk. When an item’s expiration date is reached, the item is listed as expired. If it is not collected by a specified time, it should be removed from the hold shelf and returned to its permanent location.  
On this page, you can:  
• Extend the request to a later time or date  
• Mark the item for reshelving  
• Mark the item to send to the circulation desk  
• Mark the item to send to another library  
• Activate the next request waiting for this item in the queue | Managing Expired Hold Shelf Items |
<p>| Expired      | Fulfillment &gt; Resource Requests &gt; Expired Hold Shelf Items           |               |                              |                                                                                                                                                                                                             |                   |
| Hold Items   |                                                                     |               |                              |                                                                                                                                                                                                             |                   |
| In Process   | Fulfillment &gt; Resource Requests &gt; Manage In Process Items or         | Acquisition   | Receiving Operator           | After you receive physical material, it may be necessary to perform work on the material before it can be made available to the library. In addition, a work order request may require you to perform work on material before other requests can be made on it. You process new material or work orders on this page. |                   |
| Items        |                                                                     | Technical     | Purchasing Operator         |                                                                                                                                                                                                             |                   |
|              |                                                                     | Services      |                              |                                                                                                                                                                                                             |                   |
|              |                                                                     | Binding        |                              |                                                                                                                                                                                                             |                   |</p>
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</thead>
</table>
| Acquisitions > Post-Receiving Processing > Receiving Department Items | Digitization                      | Work Order Operator (digitization) | This page appears differently in a digitization department and in any other department (such as an acquisitions technical services department). In a digitization department, on this page, you can:  
• Cancel the request  
• Indicate that the request will be fulfilled using an electronic item rather than a physical item, or vice versa  
• Attach the digitized item to the request  
• Deliver the item to the requester(s) by email  
• Save the digitized item  
In any other department, on this page, you can:  
• Indicate that processing has moved to a new stage or is complete  
• Edit a physical item's information  
• Extend the request to a later time or date  
• Print a slip containing information about the item  
• Write the item's information to RFID  
• Un-receive the item (in a receiving department) |                              |
| Pick Up Requested Resources                      | Fulfillment > Resource Requests > Pick From Shelf | Physical Item Requests Operator | Physical items are picked up from a shelf in the stacks (the general shelves of the library). If requested by a patron, the item is transferred to the hold shelf. On this page, you can:  
• Print a call slip for the item before going to look for the item  
• Cancel the request or have it picked up by another location  
• Extend the request to a later time or date  
• Mark the item as missing  
• Convert the request to a resource sharing borrowing request | Pickup at Shelf                          |
| Resource Request Monitoring                      | Fulfillment > Resource Requests & Item Processes | Binding Booking Digitization General Hold Move | Most workflow requests appear on this general information page. On this page, you can:  
• View the history of the request  
• Cancel the request  
• Extend the request to a later time or date  
• Mark the item as missing | Managing Requests and Work Orders            |
<table>
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<tr>
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</tr>
</thead>
</table>
| Physical Item Ship Restore Transit for Resheling | Fulfillment Services Operator Fulfillment Services Manager | Patrons can locate resources at other institutions and ask that they be delivered to the local institution. This creates a borrowing request at the local institution and a lending request at the partner institution. For physical items, the item is received by the local institution, picked up and returned by the patron, and (typically) returned to the partner institution. Electronic items can be delivered digitally or physically from the partner institution. On this page, you can:  
• Add a new borrow request  
• View, edit, copy, cancel, or reject a request  
• Ask the patron for more information  
• Edit the physical item's information  
• Recalculate the rota (see Resource Sharing Partners and ROTAs)  
• Send the request to the partner institution  
• Mark a request as recalled by the partner institution, received, returned by the patron, or completed (remove the request)  
• Renew a request or request a renewal of a request |

| Resource Sharing Borrowing Requests Task List | Fulfillment > Resource Requests > Borrowing Requests | Borrowing | On this page, you can:  
• Print a call slip for the item before going to look for the item  
• Convert the request to a resource sharing borrowing request |

| Resource Sharing Lending Requests Task List | Fulfillment > Resource Sharing > Lending Requests | Lending | On this page, you can:  
• Add a new lend request  
• View, edit, copy, cancel, or reject a request |
# The Request Queue

When multiple requests are placed on the same item, the requests are queued. The list of requests can be viewed on the Request Queue page (Fulfillment > Resource Requests > Monitor Requests & Item Processes; select the **Place in Queue** value in one of the items).

The top of the page presents the title, current location, call number, and maximum requests that can be active for the item (which is generally equal to the number of copies of the book).

The following information appears for each request:

- **Request Type**
- **Destination** - The location where the item is expected as a result of this request
- **Current Activity** - The current workflow step
- **Priority** - The request priority. See [Request Priority](#).
- **Barcode**
- **Material Type**
- **Request Date** - For completed requests, the request date will show the date that the request was completed or canceled.
- **Interested Until** - An expiration date for this request
- **Requester**
- **Description**
- **Requester Group** - The user group of the requester
- **Activate** - Move this request to the top of the queue. This option appears only if an item is available. See [Request Priority](#).
**Request Priority**

The request priority for each item in the queue determines which request in the queue is active. Library requests, such as move requests and work order requests, take priority over patron requests. Patron requests are fulfilled by the order in which they were created. The Request Priority fulfillment policy can change priorities for a group. For information on this policy, see Configuring Fulfillment Policies.

The priority is relevant for requests only before their workflow processing has started.

**Resource Sharing Partners and Rotas**

A **partner** is an institution, other than yours, that is willing to fulfill a resource sharing request or that may ask you to fulfill a resource sharing request. A **rota** is a list of partners that are queried to see if they can fulfill a particular resource sharing borrowing request. A rota can be ordered, where the partners are queried in a specific order, or random. You can have multiple rotas, each defined by a **rota template**.

When you create a borrowing request, you can manually assign one or more partners to the request, either directly and/or using one or more rotas. A rota is also assigned automatically if it matches a **rota assignment rule**.

To configure partners, see Resource Sharing Partners. To configure rota templates, see Configuring Rota Templates. To configure rota assignment rules, see Configuring Rota Assignment Rules.

**Resource Sharing Requests with Multiple Items**

Resource sharing requests may be fulfilled by one or more items. When multiple items have been shipped for a request, multiple line items will be displayed in the following places:

- Patron Services - requests tab
- Resource Request Monitoring
- Active/Expired Hold Shelves
- Receiving/Shipping Items

Additionally, the Resource Sharing Task List indicates the existence of multiple items with a **Multiple Barcodes** link (see also Receiving or Shipping Multiple Items for a Single Request).

In contrast, the Primo My Account request list shows only one line item per request. This is because Primo displays only the resource sharing request, regardless of how many items shipped to fulfill the request, while Alma displays all the items to the operator that are on shelf or in transit.
Request Jobs

Alma provides several jobs that can be used to manage requests in bulk. Manual jobs can be used to create or delete requests on physical items or titles. See the relevant page or entry to see details and configuration information about scheduled jobs.

Manual

- [Cancel Physical Items Requests](#) - Cancels open requests for physical items.
- [Create Physical Item Move Requests](#) - Initiates moving physical items to a new location.
- [Create Physical Item Work Orders](#) - Creates a work order request for physical items.
- [Cancel Physical Titles Requests](#) - Cancels open requests for physical titles.

Scheduled

- [Delete Acquisition Requests](#) - This is an internal job that removes dummy internal acquisition requests.
- [Requests - Handle Expiration Step](#) - Marks requested items as missing when requests in the pickup from shelf stage have passed their expiration date.
- [Requests - Restore Temporary Shelved Items](#) - Creates restore item requests on all temporarily shelved items whose due back date is the current day or earlier.
- [Requests - Recalculate after Inventory Update](#) - Recalculates requests after changes to the inventory are made.
- [Requests - Send Report](#) - Generates one letter per patron detailing all requests by status.
- [Expired Resource Sharing Request](#) - Checks for expired resource sharing requests.
- [Items Requiring Special Action](#) - Identifies items which may require some action, including items that have requests on them.
- [Transfer Requests](#) - Move all requests from a circulation desk to a different circulation desk in the same library.