Fulfilling Requests

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Pick From Shelf List

Alma video: Physical Item and Move Requests

The Pick From Shelf list is used to show outstanding requests for items from your library location, and to print Pick Slips for staff and student workers to use when retrieving items to fill these requests.

1. Go to “Fulfillment” and select “Pick From Shelf”.

2. This brings you to the Pick From Shelf list, which says “Pick Up Requested Resources” at the top. This list has all of the current requests for materials from your library location. If desired, use the facets in the left sidebar to filter the requests.
3. Selected facets appear at the top of the list of items. To remove a facet, click the “X” to the right of that facet.

4. The list is sorted based on the item’s call number or location, in ascending or descending order, depending on the option selected.

Note: Alma uses the full call number, including any prefixes such as “Q.” or “Doc.” or “DVD”, when ordering by call number. For instance, in the example below, Dewey call numbers with a “Q.” prefix are interfiled with Library of Congress call numbers.
5. The Pick From Shelf list shows requests for items in your unit library. These requests can be from local or I-Share patrons. The list shows information about the item, such as the title, location, and call number, but it does not show much information about the request itself or the requesting patron.

![Example of the Pick From Shelf list](image1)

6. To see information about the request, click the number next to the word “Requests”. **Note:** This number is the number of active requests associated with this item.

![Example of the Request Queue](image2)

7. Clicking the number next to “Requests” will bring up the Request Queue, which shows information about the patron who requested the item, as well as any other patrons who are in the queue to request the item.

![Example of the Request Queue](image3)

**Note:** All items that have “Pickup From Shelf” in the Current Activity are active requests.

**Note:** Alma allows requests for items that are currently unavailable (for instance, items checked out or with work orders). However, these requests will not display in the Pick From Shelf list. Instead, the request will appear in the item’s Request Queue and will be activated automatically when the item becomes available again. For more details, see the “Monitoring Local Item Requests” documentation.
Printing Pick Slips

1. Print Pick Slips by clicking the check box for each slip you want printed. Click “Select All” to choose all of them, or mark the checkbox next to the individual request(s) to choose only some. Then click “Print Slip” (not “Print Slip Report”).

![Pick Up Requested Resources](image)
2. Pick Slips display information about the requested item at the top, including the item’s location, call number, title, author, and material type. **Note:** Requests in Alma can be placed at the item level or the title level. If a request was placed at the item level, the Pick Slip will display that item’s barcode (example 1 below). If the request was at the title level, the Pick Slip will not have an item barcode (example 2 below).

Below the item information, Pick Slips display information about the request, including the requester’s patron type, the pick-up destination, the Request Type, the Request ID, and the requester’s Patron ID.

**Note:** When a Pick Slip is printed for a request, that request goes to the "Yes" section of the "Request Printed" facet in the left sidebar. This facet can be used to keep track of which Pick Slips have been printed already, and which ones have yet to print.

**Note:** It is possible to print individual slips for items in the Pick From Shelf list by clicking the “…” button in the upper right corner of the item’s entry on the list and selecting “Print Slip”. However, doing so is not recommended, because in certain situations it does not print everything needed.
Accessing the Slip Report

The Slip Report is a spreadsheet containing information about requests on the Pick From Shelf list. It's useful because it gathers all the information in one place, and it displays more information about the requests than what is visible in the list itself or on the individual Pick Slips.

1. Print the Slip Report by clicking “Print Slip Report” in the upper right corner of the Pick From Shelf list screen. This report can be exported to Excel and printed or used digitally.

2. This Slip Report can be downloaded or printed, as an XML or Excel file. To download the report, select “User” and click “Download”.

3. To print the report, select “Printer”, choose the desired printer from the drop-down menu, and click “Send”.

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**Note:** If you have one or more facets selected in the Pick From Shelf list when you click “Print Slip Report”, the Slip Report will only include the entries that fall under the facet(s).

**Note:** Printing the Slip Report does not change the “Request Printed” status of requests in the Pick From Shelf list. However, it does change the “Request Reported” status of any requests that were in the Slip Report to “Yes”. 
Scanning in Retrieved Requests

Alma video: Physical Item and Move Requests

Note: If you are processing items that have been returned, use the “Return Items” instructions instead. Do not use the “Scan In Items” page to process items that have been returned.

1. Once the requested items are retrieved from the shelf, they need to be processed.

2. Navigate to “Fulfillment” and select “Scan In Items”.

3. Check that the options on the “Scan In Items” screen are on the recommended settings:
   a. Select “Yes” for “Place directly on hold shelf”
   b. Select “Yes” for “Automatically print slip”
   c. Check the “Register in-house use” checkbox

4. Scan the item barcodes into the “Scan item barcode” field.
5. As items are scanned in, the items will be listed below the “Scan item barcode” box. Note that the “Destination” section is different for items that have been requested to be placed on hold at the user’s current location, items requested for hold at other on-campus libraries, and items requested for hold at I-Share libraries.

6. If the item needs to go to another library location, a printing dialogue box will appear and prompt the user to print a Transit Slip.

7. If the item is for the local hold shelf, Alma will automatically send a hold notification to the patron, and a print dialogue box will appear and prompt the user to print a Hold Shelf Slip.

8. If the item needs to be reshelved, this will be reflected in the “Destination” section, and the item status will change to “Item in Place.”
**Linking a Specific Item to a Bib-Level Request**

Bib-level requests are associated with the record that represents a work or title. Item-level requests are associated with a specific, physical item that exists on our shelves. Sometimes a request will note that it is for a particular item, such as one volume in a series, but the request itself is a bib-level request rather than an item-level request. When a request is bib-level, that specific item isn’t linked to the request in Alma. **Note:** All I-Share requests made in Primo are bib-level.

Follow the steps below to link the specific item to the bib-level request so that it can be processed.

1. Scan in the item in the “Scan In Items” screen.

2. A small pop-up appears, indicating that the scanned item may fulfill an existing holdings request.

3. Click the “… button (also known as the action button) at the end of the row that appeared when you scanned in the item. From the drop-down menu, select “Attach to Request”.

4. This will take you to a new page. On this page, use the checkbox to select the request, and click “Attach” to attach the item to the request.

5. Now that the specific item is attached to the request, you should be able to process it normally.
Quick Facets Notes

- **Request Date**: This facet sorts by the date on which the patron made the request. The facets do not overlap at all—for instance, “Up to a Week Ago” does not include “Today” or “Yesterday”. The facets cover the following time frames:
  - Today: 0 days ago
  - Yesterday: 1 day ago
  - Up to a week ago: 2-6 days ago
  - Up to a month ago: 7-30 days ago
  - Older: 31+ days ago

- **Destination**: This facet sorts by the location where the patron will pick up the item, or the location to which the item will be moved. The “Hold Shelf” facet refers to items that are to be picked up at your location.
View Title in Search

Sometimes it's necessary to view the item information for a particular item that has been requested. There's a simple way to go directly from the Pick From Shelf list to the List of Items.

1. To see the item record, from the Pick From Shelf list, click the “…” button and select “View Title in Search”.

2. Then click “Physical” at the bottom of the entry, and in the drop-down section that appears below, click “Items”.

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3. Click an item’s barcode for additional details.
Requested Item was Not On Shelf (NOS)

If no copies of the requested item are found on the bookshelves in your unit library, and there is only one request on the item, go through the following workflow. (For a simplified version of the NOS workflow, please see the Quick Reference NOS Workflow Table below this section.)

Before you begin, take note of information about the requested title that will help you find the item again later on when you toggle the Missing status:

A. From the Pick From Shelf list, click the "..." button and select "View Title in Search".

B. Copy identifying information about the title, such as the MMS ID or the OCLC control number, and paste it somewhere you can find it again easily.
   i. The OCLC control number starts with "(OCoLC)" and can be found by clicking the "Click here for more information" icon (which looks like a stack of two chevrons) in the "Record number" field.
   ii. The OCLC control number can be used to look up the title in both the Institution Zone and the Network Zone, while the MMS ID can only be used in the Institution Zone (the title will have a different MMS ID in the Network Zone).

Once you’ve made a note of identifying information for the title, check Alma, Primo, and/or the printed Pick Slip to get the following information (and note that “available copies” means “at least one copy that is a circulating copy and is currently available”):

- Is the request from a local (UIUC) patron, or from an I-Share patron?
- How many available copies are there supposed to be in your unit library?
- Are there any available copies in other unit libraries at UIUC?
- If there are not any other available copies at UIUC, are there any available copies in I-Share?
- (This information is only necessary if the request is for a local patron, and there are no available UIUC copies but there is an available I-Share copy.) Is the pick-up location at UIUC or at an I-Share institution?
1. If the request is for a local patron, continue with this step. If it is for an I-Share patron, skip ahead to step 2.
   a. If another UIUC unit library has an available copy:
      i. First, click the “…” button on the right side of the entry in the Pick From Shelf list, click “Manual Skip Location”, and select a unit library to reassign the request to.
      ii. Next, toggle the missing status to Missing for all of the copies that should have been on your unit library’s bookshelves. See step 3 below for how to do that. (Note: There is a “Mark as Missing” button in the Pick From Shelf list, but it doesn’t work properly. Please do not use it.)
   b. If there are no other available copies at UIUC, but there is an available copy in I-Share, and the request was for pick-up at a UIUC location:
      i. First, click the “…” button on the right side of the entry in the Pick From Shelf list, and click “Convert to Resource Sharing”. This will promote the request to I-Share. (This only works if the local patron requested the item for a local pick-up.)
      ii. Next, toggle the missing status to Missing for all of the copies that should have been on your unit library’s bookshelves. See step 3 below for how to do that. (Note: There is a “Mark as Missing” button in the Pick From Shelf list, but it doesn’t work properly. Please do not use it.)
   c. If there are no other available copies at UIUC, but there is an available copy in I-Share, and the request was for pick-up at an I-Share location:
      i. First, click the “Cancel Request” button on the right side of the entry in the Pick From Shelf list. In the pop-up that appears, select the reason why you aren't filling the request, uncheck the “Notify user” box, and then click “Confirm”. In this situation, the “Cancel Request” button will actually cancel the request, so you will have to place a new I-Share request for the patron after toggling the Missing status of the item.
      ii. Next, toggle the missing status to Missing for all of the copies that should have been on your unit library’s bookshelves. See step 3 below for how to do that. (Note: There is a “Mark as Missing” button in the Pick From Shelf list, but it doesn’t work properly. Please do not use it.)
      iii. Finally, place a new I-Share request for this item on the patron’s behalf.
   d. If there are no available copies anywhere at UIUC or in I-Share:
      i. First, click the “Cancel Request” button on the right side of the entry in the Pick From Shelf list. In the pop-up that appears, select the reason why you aren't filling the request, make sure there’s a check in the “Notify user” box, and then click “Confirm”. In this situation, doing this will cancel the request and send the patron a Request Cancellation notice.
      ii. Next, toggle the missing status to Missing for all of the copies that should have been on your unit library’s bookshelves. See step 3 below for how to do that. (Note: There is a “Mark as Missing” button in the Pick From Shelf list, but it doesn’t work properly. Please do not use it.)
2. If the request is for an I-Share patron:
   a. If another UIUC unit library has an available copy:
      i. First, click the “…” button on the right side of the entry in the Pick From Shelf list, click “Manual Skip Location”, and select a unit library to reassign the request to.
      ii. Next, toggle the missing status to Missing for all of the copies that should have been on your unit library’s bookshelves. See step 3 below for how to do that. (Note: There is a “Mark as Missing” button in the Pick From Shelf list, but it doesn’t work properly. Please do not use it.)
   b. If there are no other available copies at UIUC, but there is an available copy in I-Share:
      i. First, click the “Cancel Request” button on the right side of the entry in the Pick From Shelf list. In the pop-up that appears, select the reason why you aren’t filling the request, uncheck the “Notify user” box, and then click “Confirm”. In this situation, the “Cancel Request” button will promote the request to I-Share, but it only works for I-Share patrons, and only if there’s an available I-Share copy.
      ii. Next, toggle the missing status to Missing for all of the copies that should have been on your unit library’s bookshelves. See step 3 below for how to do that. (Note: There is a “Mark as Missing” button in the Pick From Shelf list, but it doesn’t work properly. Please do not use it.)
   c. If there are no available copies anywhere at UIUC or in I-Share:
      i. First, click the “Cancel Request” button on the right side of the entry in the Pick From Shelf list. In the pop-up that appears, select the reason why you aren’t filling the request, make sure there’s a check in the “Notify user” box, and then click “Confirm”. In this situation, doing this will cancel the request and send the patron a Request Cancellation notice.
      ii. Next, toggle the missing status to Missing for all of the copies that should have been on your unit library’s bookshelves. See step 3 below for how to do that. (Note: There is a “Mark as Missing” button in the Pick From Shelf list, but it doesn’t work properly. Please do not use it.)
3. How to toggle the missing status
   a. This should be done from the List of Items page. To get there, use an “All Titles” or “Physical Titles” search in the persistent search box at the top of the page to look up the item. (If you took note of the OCLC control number or MMS ID earlier, this is the easiest way to search for this. Use the “Keywords” search index to search for either of those numbers.)

   ![Screenshot of the List of Items page]

   ![Screenshot of the Items button being clicked]

   b. From there, find the correct entry in the list (there may be only one entry). Click the "Items" button near the top right of that entry. (If there is no “Items” button, click the word “Physical” at the bottom of the entry, and then click “Items” at the bottom of the newly expanded entry.)
c. This is the List of Items page.

<table>
<thead>
<tr>
<th>Barcode</th>
<th>Library</th>
<th>Location</th>
<th>Call Number</th>
<th>Item Call Number</th>
<th>Year</th>
<th>Vol</th>
<th>Descip</th>
<th>Temp Locat</th>
<th>Status</th>
<th>Process Type</th>
<th>Acc Nur</th>
<th>Receiving date</th>
</tr>
</thead>
<tbody>
<tr>
<td>30112046244262</td>
<td>Main Stacks</td>
<td>Stacks</td>
<td>821.08 M723</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Item not in place</td>
<td>Missing</td>
<td>04/22/...</td>
<td></td>
</tr>
<tr>
<td>30112000291309</td>
<td>Literatures and Languages Library</td>
<td>Stacks A</td>
<td>PR8858</td>
<td>M63 1995</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Item not in place</td>
<td>Missing</td>
<td>04/22/...</td>
<td></td>
</tr>
</tbody>
</table>

**Fulfilling Requests**

**c.** Find the copy of the item that you want to mark Missing, and click the "..." button on the right side. Select "Toggle Missing Status" from the drop-down menu. **Note:** If you don’t see that option in the menu, check step 3.f (Troubleshooting Steps) below.

**d.** Once you have clicked the “Toggle Missing Status” option, the Status should change to “Item not in place” and the Process Type should change to “Missing”.

**e.**
f. **Troubleshooting Steps:** Whether or not “Toggle Missing Status” is an option in the menu depends on a variety of factors. Here are some things to check if you don’t see it:

   i. Check that you are in the correct Library Location.

   ![Library Location Screen](image)

   ii. Check that you are looking at the correct copy of the item (including the volume and year, if applicable), and that it is from your unit library. You can’t toggle the Missing status for an item that belongs to a different unit library. To get additional information about the copy, click the hyperlinked item barcode.

   ![Barcode Table](image)

   iii. The Status should be “Item in place”. If it isn’t, double-check that you followed the first parts of the step that applied to this item’s situation (as seen above, in either section 1 or section 2 of this workflow) before attempting to toggle the Missing status.

   ![Barcode Table](image)

   iv. If you have gone through all of the troubleshooting steps and you still do not have a “Toggle Missing Status” option, you may not have the correct permissions in Alma to toggle the Missing status. Check with your supervisor, or contact Central Access Services at circlib@library.illinois.edu for further assistance.
### Quick Reference NOS Workflow Table

<table>
<thead>
<tr>
<th>Patron Type</th>
<th>Number of Requests on item</th>
<th>Can’t find copy/copies at your library, but there’s an available copy at another UIUC unit library?</th>
<th>Can’t find copy at UIUC, but I-Share available?</th>
<th>No copies available at UIUC or I-Share?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local</td>
<td>1</td>
<td>Reassign the request with &quot;Manual Skip Location&quot;, and then toggle the missing status to Missing for each copy that was supposed to be available at your unit library.</td>
<td>If it’s for a UIUC pick-up location: Click “Convert to Resource Sharing”, and then toggle the missing status to Missing for each copy that was supposed to be available at your unit library.</td>
<td>Cancel the request (the “Notify user” box should be checked), and then toggle the missing status to Missing for each copy that was supposed to be available at your unit library.</td>
</tr>
<tr>
<td>I-Share</td>
<td>1</td>
<td>Reassign the request with &quot;Manual Skip Location&quot;, and then toggle the missing status to Missing for each copy that was supposed to be available at your unit library.</td>
<td>Cancel the request** (uncheck the “Notify user” box), and toggle the missing status to Missing for each copy that was supposed to be available at your unit library.</td>
<td>Cancel the request (the “Notify user” box should be checked), and then toggle the missing status to Missing for each copy that was supposed to be available at your unit library.</td>
</tr>
</tbody>
</table>

**For requests from I-Share patrons, cancelling the request in Alma is what “promotes” the request to the Automated Fulfillment Network (if there are any available copies in the AFN).**

**Note:** Go to the List of Items to [toggle the missing status to Missing](#). Do not use the “Mark as Missing” button in the Pick From Shelf list because it doesn’t work consistently.

**Note:** “Convert to Resource Sharing” does not work when it’s a UIUC patron requesting a UIUC item to be put on hold at another I-Share institution.
Requested Item was Damaged

If your unit library’s copy or copies of the requested item are too damaged to be loaned out, and there is only one request on the item, go through the following workflow. Details on how to place a Work Order on an item can be found in the Work Order Alma documentation. (For a simplified version of the Damaged Item workflow, please see the Quick Reference Damaged Item Workflow Table below this section.)

Before you begin, check Alma, Primo, and/or the printed Pick Slip to get the following information (and note that “available copies” means “at least one copy that is a circulating copy and is currently available”):

- Is the request from a local (UIUC) patron, or from an I-Share patron?
- How many available copies are there supposed to be in your unit library?
- Are there any available copies in other unit libraries at UIUC?
- If there are not any other available copies at UIUC, are there any available copies in I-Share?
- (This information is only necessary if the request is for a local patron, and there are no available UIUC copies but there is an available I-Share copy.) Is the pick-up location at UIUC or at an I-Share institution?

1. If the request is for a local patron, continue with this step. If it is for an I-Share patron, skip ahead to step 2.
   a. If another UIUC unit library has an available copy:
      i. First, click the “… ” button on the right side of the entry in the Pick From Shelf list, click “Manual Skip Location”, and select a unit library to reassign the request to.
      ii. Next, place a Work Order on each damaged copy from your unit library.
   b. If there are no other available copies at UIUC, but there is an available copy in I-Share, and the request was for pick-up at a UIUC location:
      i. First, click the “… ” button on the right side of the entry in the Pick From Shelf list, and click “Convert to Resource Sharing”. This will promote the request to I-Share. (This only works if the local patron requested the item for a local pick-up.)
      ii. Next, place a Work Order on each damaged copy from your unit library.
   c. If there are no other available copies at UIUC, but there is an available copy in I-Share, and the request was for pick-up at an I-Share location:
      i. First, click the “Cancel Request” button on the right side of the entry in the Pick From Shelf list. In the pop-up that appears, select the reason why you aren't filling the request, uncheck the “Notify user” box, and then click “Confirm”. In this situation, the “Cancel Request” button will actually cancel the request, so you will have to place a new I-Share request for the patron after placing the Work Order(s).
      ii. Next, place a Work Order on each damaged copy from your unit library.
      iii. Finally, place a new I-Share request for this item on the patron’s behalf.
   d. If there are no available copies anywhere at UIUC or in I-Share:
      i. First, click the “Cancel Request” button on the right side of the entry in the Pick From Shelf list. In the pop-up that appears, select the reason why you aren't filling the request, make sure there’s a check in the “Notify user” box, and then click “Confirm”. In this situation, doing this will cancel the request and send the patron a Request Cancellation notice.
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      ii. Next, place a Work Order on each damaged copy from your unit library.
   b. If there are no other available copies at UIUC, but there is an available copy in I-Share:
      i. First, click the “Cancel Request” button on the right side of the entry in the Pick From Shelf list. In the pop-up that appears, select the reason why you aren't filling the request, uncheck the “Notify user” box, and then click “Confirm”. In this situation, the “Cancel Request” button will promote the request to I-Share, but it only works for I-Share patrons, and only if there’s an available I-Share copy.
      ii. Next, place a Work Order on each damaged copy from your unit library.
   c. If there are no available copies anywhere at UIUC or in I-Share:
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<td>Cancel the request** (uncheck the “Notify user” box), and then place a Work Order on each damaged copy.</td>
<td>Cancel the request (the “Notify user” box should be checked), and then place a Work Order on each damaged copy.</td>
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