

Requesting Exercises

Objective: At the end of these exercises, the learner will be able to request UIUC and I-Share items in Primo VE and in Alma.

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Instructional Video

In addition to the written documentation linked in individual exercises, a video from May 2020 about Requesting Items in Primo and Alma can be viewed here:

https://mediaspace.illinois.edu/media/t/1_poo52mg2

(You will need to log in using your NetID and password to view the video.)

Recommended Options for Exercises

Since these exercises will be done in the actual Alma and Primo VE, rather than in a practice sandbox, you'll need to make sure you don't leave any loose ends (such as requests that cause staff to retrieve a book you don't really want).

Options for practicing with UIUC items:

1. You can **take the request through the whole process**, including checking it out and returning it. At the end of the process, the item's status in Alma should be "Item in place" again.
 - a. If you choose this option, please include a note in the request that says, "This is a test. Please do not fill this request." That way, on-site staff will know that they don't need to retrieve it.
 - b. For this option, you should use an item that has a copy in your unit library and doesn't have a copy in any other UIUC unit libraries.
 - i. In Primo, you can use the facets in the sidebar under "Library" to help find this. Hover over the name of a library to bring up two boxes. Check the blank box on the left to include it, or click the red symbol  on the right side to exclude it.
2. If you just want to practice placing the request without doing the entire process, you can **place the request and then cancel it**. At the end of the process, the item's status in Alma should be "Item in place" again.
 - a. If you do this, please include a note in the request that says, "This is a test. Please do not fill this request." That way, on-site staff will know that they don't need to retrieve it (in case they see it before you cancel it).
3. If you actually want the item, you can just **place the request for yourself**.

Options for practicing with I-Share items:

1. You can go up to the point where you would submit the request, but then **cancel out of it before submitting it**.
 - a. For I-Share items, we don't recommend submitting the request and then canceling it. That has too much potential for errors that would be a bit of a pain to fix.
2. If you actually want the item, you can just **place the request for yourself**.

Placing Local Requests in Primo VE

Objective: At the end of this exercise, the learner will be able to place a request for a local item in Primo VE.

Exercise: Read the options on [page 2](#) of this document and pick one to follow. Then complete the following steps:

1. Go to Primo VE: https://i-share-uiu.primo.exlibrisgroup.com/discovery/search?vid=01CARLI_UIU:CARLI_UIU&lang=en
2. Sign in as a University of Illinois user with your NetID and password.
3. Search for your favorite animal in the Library Catalog.
4. Find an item in the results that is available to check out. Click on the item to bring up the item record.
5. Click on “Request Physical Item” in the “Get It” section.
6. Choose your Pickup Institution and Library Pickup Location where you would like to pick up the item. A “Not needed after” date is optional.
7. If you don’t actually need the item, enter a note that says, “This is a test. Please do not fill this request.”
8. Click “Send Request” to finish the request.
9. You can click on your name at the upper right corner and click “My Requests” to see the status of this request.
10. If this is just for practice, do one of the following:
 - a. Cancel the request, OR
 - b. Go through the rest of the process for this item:
 - i. Print the Pick Slip, retrieve the item (or find the barcode in Alma), and scan in the item barcode.
 1. See [Fulfilling Requests](#) for instructions.
 - ii. Check the item out.
 1. See [Loan Items](#) for instructions.
 - iii. Check the item back in.
 1. See [Return Items](#) for instructions.

Placing I-Share Requests in Primo VE

Objective: At the end of this exercise, the learner will be able to place a request for an I-Share item in Primo VE.

Exercise: Read the options on [page 2](#) of this document and pick one to follow. Then complete the following steps:

1. Go to Primo VE: https://i-share-uiu.primo.exlibrisgroup.com/discovery/search?vid=01CARLI_UIU:CARLI_UIU&lang=en
2. Sign in as a University of Illinois user with your NetID and password.
3. Search for a word that starts with the same letter as your first name in “All I-Share Libraries”.
 - a. As you type the word, three options should appear below the search bar: “Library Catalog”, “All I-Share Libraries”, and “Course Reserves”. Click the one you want.
4. Find an item that is available via another I-Share library (but is not available locally, as you’ll be unable to place an I-Share request if there’s a local copy available to request).
 - a. In the Facets sidebar, under “Availability”, you can hover over “Held by library” to bring up two boxes. Click the red symbol  on the right side to exclude items held by UIUC in the search results.
5. Click on the item to bring up the item record.
6. Click on “Request from I-Share Libraries” in the “How to Get it” section.
7. Select your Preferred Pickup Institution and Preferred Pickup Location where you would like to pick up the item. A “Not needed after” date is optional.
8. If you are actually requesting the item, click “Send Request” to finish the request. If this is just for practice, click “Back” or X out of the item record so the request doesn’t go through.
9. If you requested the item for yourself, you can click on your name at the upper right corner and click “My Requests” to see the status of this request.

Requesting Local Items on a Patron's Behalf in Alma

Objective: At the end of this exercise, the learner will be able to place a request in Alma for a local item on behalf of a patron.

Exercise: Read the options on [page 2](#) of this document and pick one to follow. Then, using the Alma documentation "Requesting Local Items on a Patron's Behalf" located here:

<https://www.library.illinois.edu/staff/wp-content/uploads/sites/24/2020/04/Requesting-Local-Items-on-a-Patron%E2%80%99s-Behalf.pdf>

complete the following steps:

1. Go to Alma: <https://go.library.illinois.edu/alma>
2. Log in using your NetID and password.
3. Using the persistent search bar at the top of the page, search for your favorite food. Before searching, make sure you have selected "Institution" from the icon drop-down menu left of the search button, so it will only search UIUC.
4. Find an item that is available, click the "... " button in the upper right corner for that item, and select "Request".
5. In the "Request Type" drop-down menu, select "Patron physical item request".
6. Enter (scan) the patron's barcode into the "Requester" field.
 - a. If you intend to request the item for yourself, use your own barcode.
 - b. Otherwise, you can use barcode 20112000204270 for dummy patron Whitney Houston.
7. Select the pickup location from the "Pickup At" drop-down menu. You can also choose to pick up at a different institution by selecting it from the "Pickup Institution" menu.
8. If you don't actually need the item, enter a note that says, "This is a test. Please do not fill this request."
9. Click the "Submit" button near the upper right corner to finish the request.
10. You can pull up the patron's account from the "Manage Patron Services" screen and click the "Requests" tab to see the status of this request.
11. If this is just for practice, do one of the following:
 - a. Cancel the request, OR
 - b. Go through the rest of the request process for this item:
 - i. Print the Pick Slip, retrieve the item (or find the barcode in Alma), and scan in the item barcode.
 1. See [Fulfilling Requests](#) for instructions.
 - ii. Check the item out.
 1. See [Loan Items](#) for instructions.
 - iii. Check the item back in.
 1. See [Return Items](#) for instructions.

Requesting I-Share Items on a Patron's Behalf in Alma

Objective: At the end of this exercise, the learner will be able to place a request in Alma for an I-Share item on behalf of a patron.

Exercise: Read the options on [page 2](#) of this document and pick one to follow. Then, using the Alma documentation "Request I-Share Items on a Patron's Behalf" located here:

<https://www.library.illinois.edu/staff/wp-content/uploads/sites/24/2020/11/I-Share-Requests.pdf>
complete the following steps:

1. Go to Alma: <https://go.library.illinois.edu/alma>
2. Log in using your NetID and password.
3. Using the persistent search bar at the top of the page, search for a type of plant. Before searching, make sure you have selected "Network" from the icon drop-down menu left of the search button AND make sure you are searching "All titles."
4. Find an item that is available and click the "Resource Sharing Request" button in the upper right corner for that item.
 - a. If there's no such button on the item's entry, try expanding your browser window.
5. Enter (scan) the patron's barcode into the "Requester" field.
 - a. If you intend to request the item for yourself, use your own barcode.
 - b. Otherwise, you can use barcode 20112000198571 for dummy patron Idris Elba.
6. Select the pickup location from the "Preferred Local Pickup Location" drop-down menu. You can also choose to pick up at a different institution by selecting it from the "Preferred Pickup Institution" menu.
7. If you are actually requesting the item for yourself, click the "Save" button near the upper right corner to finish the request. If this is just for practice, click the "Cancel" button so it doesn't go through.