Monitoring Local Requests

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Alma video: Physical Item and Move Requests

There will be times when it necessary to check on the status of a Request or Work Order. Requests refer to the acquisition, movement, manipulation, or processing of an item. Work Orders are requests for a specific action to be performed on a physical item, such as digitization or repair, and are sent to a specific department to complete that task. These tasks (e.g. Requests or Work Orders) may not show up in your Pick from Shelf list, either because something in the system is preventing the task from being moved forward in the workflow (Example: A request is made on an item currently on loan to another patron) or because the Request or Work Order belongs to a different local library location.

If you have the Fulfillment Operator or Fulfillment Service Manager role, you will be able to see all Requests and Work Orders from all UIU Libraries. If you have the Request Operator role, you will be able to see all Requests and Work Orders associated with your Library.

| * | » | Acquisitions | Resources | Fulfillment | Admin | Analytics |
|------|---|--------------|-----------|-------------------------------|---------------------------------|------------------|
| is ▼ | | | | Checkou Manage Return I | ut/Checkin Patron Se tems | rvices |
| | | | | Resourc | e Requests | 6 |
| | | | | Pick Fro Scan In | m Shelf Items | |
| | | | | Expired | Hold Shelf | |
| | | | | Active H | lold Shelf | |
| | | | | Manage | In Process | s Items |
| | | | | Approva | I Requests | List |
| | | | | Monitor | Requests | & Item Processes |
| | | | | | | |

1. To view the status of a task, go to "Fulfillment" and select "Monitor Requests and Item Processes".

2. This brings you to the Resource Requests Monitoring screen, where you can see Requests and Work Orders. You can use the facets in the left sidebar to sort and filter your results.

| ExLibris | Alma | * | » Ac | quisitions | Resources | Fulfillment | Admin | Analytics |
|--|--------------------------------------|------|----------|---|--|------------------------------------|---------------------|-----------|
| | | Req | uests 🔻 | All 👻 | | | | |
| Facets | * | Reso | ource | Request | t Monitorin | ng <mark>(1 - 2</mark> 0 o | of 61) | |
| Type Request (34) In Process (27) | ~ | Ŧ | Activity | Status : Ac | tive 👻 | | | |
| Material Type Book (34) Issue (3) Undefined (21) | ~ | 1 | Ŋ | Women Reques ID: 2993 | n in the class t Type: Patron 339660005890 | ical world : in physical item r | mage and request | l text / |
| + More (2) Workflow Step Pickup From Sh | ∽ nelf (10) | | | Reques Pickup Barcode | ster: Fish, Stac Location: Love e: 3181101317 | ckles 🔊 joy Library 6535 | | |
| On Hold Shelf (Transit Item (17 Undefined (7) In Process (8) | 19) 7) | 2 | <u>S</u> | Female Reques ID: 2993 Creator | e acts in Gree t Type: Patron 339690005890 : circdesk 🔊 | ek tragedy / physical item i | request | |
| Request/Proces Acquisition tech Patron physical | ss Type ∨ hnic (27) l ite (26) | | | Reques Pickup Barcode | ster: Fish, Stac Location: Love e: 3181101221 | ckles 📧 ijoy Library 7710 | | |
| Transit For Res Request Date Today (3) Up to a week ag | helving (8) ~ go (11) | 3 | | Persep Reques ID: 2993 Creator | hone in Ame t Type: Patron 339720005890 : circdesk 📧 | erica / physical item r | request | |

3. Use the persistent search box at the top of the screen to search for a specific request or title.

Requests 🔻

All 🔻

Q

- 4. Requests or Work Orders can be divided into two categories that can be searched using the facets under Workflow Step:
 - a. <u>Undefined tasks</u> are items that are pending in the system queue and cannot currently be fulfilled either because another task is taking priority or certain information is missing that would allow the task to move forward in the workflow. Undefined can be filtered for with the "Workflow Step" facet. Examples of undefined requests are those that have no item barcode successfully linked to it or the item requested is currently checked out to another patron.
 - <u>Defined tasks</u> are Requests or Work Orders that are currently in a workflow. Defined cannot be broadly filtered for like Undefined, but specific steps of a workflow such as "Pick from Shelf" or "Transit Item" can.

| | Keeping in touch : self, sex, and society / | | | | Cancel | Edit | |
|---------|--|--|---|-------------|------------|----------|---|
| 11.12 | Request Type: Patron physical item request | Place in Queue: 1 | | | | | |
| | ID: 5341613350005899 | Request Date: 02/06/2020 | | | | | |
| | Creator: System 🔊 | | | | | | |
| | Requester: AFNExamples, CARLITest | | | | | | |
| | Pickup Location: Main Stacks | | | | | | |
| | External Identifian 52/1612070005000 | | | | | | |
| Dofinor | External identifier: 5341613270005899 | | | | | | |
| Defined | External Identifier: 5341613270005899 | e translation / by Marie Borroff. | | Cancel | Move To Ta | sk List | |
| Defined | Sir Gawain and the Green Knight. A new verse Request Type: Patron physical item request | e translation / by Marie Borroff. Place in Queue: 0 | Workflow Step: Pickup From Shel | Cancel f | Move To Ta | ısk List | |
| Defined | Sir Gawain and the Green Knight. A new verse Request Type: Patron physical item request ID: 5455566380005899 | e translation / by Marie Borroff. Place in Queue: 0 Call Number: 821 G24B01967 | Workflow Step: Pickup From Shel Process Status: New | Cancel f | Move To Ta | ısk List | • |
| Defined | Sir Gawain and the Green Knight. A new verse Request Type: Patron physical item request ID: 5455566380005899 Creator: System 🔊 | e translation / by Marie Borroff. Place in Queue: 0 Call Number: 821 G24B01967 Request Date: 04/03/2020 | Workflow Step: Pickup From Shel Process Status: New Managed By Library: Main Stacks | Cancel f | Move To Ta | ısk List | • |
| | Sir Gawain and the Green Knight. A new versu Request Type: Patron physical item request ID: 5455566380005899 Creator: System E Requester: | e translation / by Marie Borroff. Place in Queue: 0 Call Number: 821 G24B01967 Request Date: 04/03/2020 Note: This is the English translation, right? | Workflow Step: Pickup From Shel Process Status: New Managed By Library: Main Stacks Managed By Desk: Main Stacks | Cancel f | Move To Ta | ısk List | |
| Defined | Sir Gawain and the Green Knight. A new verse Request Type: Patron physical item request ID: 5455566380005899 Creator: System E Requester: Pickup Location: Literatures and Languages Library | e translation / by Marie Borroff. Place in Queue: 0 Call Number: 821 G24B01967 Request Date: 04/03/2020 Note: This is the English translation, right? | Workflow Step: Pickup From Shell Process Status: New Managed By Library: Main Stacks Managed By Desk: Main Stacks Process Date: 04/03/2020 Expiration Pate: 04/10/2020 | Cancel f | Move To Ta | ısk List | |



Workflow Step ✓ Hold Shelf Proces... (4) Pickup From Sh... (242) On Hold Shelf (758) Transit Item (127) Undefined (120) In Process (9) - Less

5. You can see who created the Request or Work Order, who the Request or Work Order is for, and the intended pick up location for the item to at the lower left-hand side of the task.

6. If the Creator is listed as System that means that it was requested through Primo.

| 2 | Keeping in touch : self, sex, and society / | | Cancel | Edit | ••• |
|-----|--|---|--------|------|-----|
| \$D | Request Type: Patron physical item request ID: 5341613350005899 | Place in Queue: 1 Request Date: 02/06/2020 | | | |
| | Creator: System 🔊 Requester: AFNExamples, CARLITest 🔊 Pickup Location: Main Stacks | | | | |
| | External Identifier: 5341613270005899 | | | | |

7. For more information about the Request or Work Order, click on the number to the right of the "Place in Queue". This number shows how many **priority** levels the task has in the Queue, NOT the total Requests or Work Orders made. The priority placed on the item is the order in which the system will process it.

Examples: The Place in Queue number will show 1 if the request is the next in line to be filled once the resource becomes available, 2 if it is 2nd in line to be filled, etc.

| | Moon / | | Cancel | Edit | |
|-------|---|---|---|--|--|
| | Request Type: Patron physical item request ID: 5309482210005899 Creator: System 🔊 | Place in Queue 1 Request Date: 11/28/2019 | | | |
| | Requester: Test, AFN UIU | | | | |
| | External Identifier: 5309482180005899 | | | | |
| | Keeping in touch : self, sex, and society / | | Cancel | Edit | |
| 1014 | Request Type: Patron physical item request | Place in Queue: 1 | | | |
| | ID: 5341613350005899 | Request Date: 02/06/2020 | | | |
| | Requester: AFNExamples, CARLITest 🔊 | | | | |
| | Pickup Location: Main Stacks | | | | |
| | External Identifier: 5341613270005899 | | | | |
| | Population: private choice and public policy; | the Essex Hall lecture for 1972 | Cancel | Edit | |
| 10 th | Request Type: Patron physical item request | Place in Queue: 1 | | | |
| | ID: 5341619810005899 | Request Date: 02/06/2020 | | | |
| | Requester: AFNExamples. CARLITEST | | | | |
| | Pickup Location: Main Stacks | | | | |
| | External Identifier: 5341619730005899 | | | | |
| | | Moon / Request Type: Patron physical item request ID: 5309482210005899 Creator: System Im Requester: Test, AFN UIU Im Pickup Location: Main Stacks External Identifier: 5309482180005899 Keeping in touch : self, sex, and society / Request Type: Patron physical item request ID: 5341613350005899 Creator: System Im Requester: AFNExamples, CARLITest Im Pickup Location: Main Stacks External Identifier: 5341613270005899 Population: private choice and public policy; Request Type: Patron physical item request ID: 5341619810005899 Creator: System Im Requester: AFNExamples, CARLITest Im Pickup Location: Main Stacks External Identifier: 5341619730005899 | Moon / Request Type: Patron physical item request Place in Queue 1 Request: System IM Request Date: 11/28/2019 Creator: System IM Request Patron physical item request Request Date: 11/28/2019 Pickup Location: Main Stacks External Identifier: 5309482180005899 Place in Queue: 1 Request Type: Patron physical item request Place in Queue: 1 Request Type: Patron physical item request ID: 534161335005899 Request Date: 02/06/2020 Request Type: Patron physical item request Place in Queue: 1 Request Location: Main Stacks External Identifier: 5341613270005899 Place in Queue: 1 Request Date: 02/06/2020 Population: private choice and public policy; the Essex Hall lecture for 1972 Place in Queue: 1 Request Type: Patron physical item request Place in Queue: 1 ID: 5341619810005899 Essex Hall lecture for 1972 Place in Queue: 1 Request Type: Patron physical item request Place in Queue: 1 ID: 5341619810005899 Request Type: Patron physical item request Place in Queue: 1 Request Date: 02/06/2020 Creator: System IM Request Type: Patron physical item request Place in Queue: 1 Request Date: 02/06/2020 Creator: System IM Requester: AFNExamples, CARLITEST IM Request Date: 02/06/2020 | Moon / Request Type: Patron physical item request ID: 5309482210005899 Creator: System IM Request Trest, AFN UIU IM Pickup Location: Main Stacks External Identifier: 5309482180005899 Place in Queue 1 Request Date: 11/28/2019 Cancel Image: System IM Request Type: Patron physical item request ID: 5341613350005899 Place in Queue: 1 Request Date: 02/06/2020 Cancel Image: System IM Request: AFNExamples, CARLITest IM Pickup Location: Main Stacks External Identifier: 5341613270005899 Place in Queue: 1 Request Date: 02/06/2020 Cancel Image: System IM Request: AFNExamples, CARLITest IM Pickup Location: Main Stacks External Identifier: 5341619270005899 Place in Queue: 1 Request Date: 02/06/2020 Cancel Image: System IM Request: Type: Patron physical item request ID: 5341619810005899 Place in Queue: 1 Request Date: 02/06/2020 Cancel Image: System IM Request: Type: Patron physical item request ID: 5341619810005899 Place in Queue: 1 Request Date: 02/06/2020 Cancel Image: System IM Request: Type: Patron physical item request ID: 5341619810005899 Place in Queue: 1 Request Date: 02/06/2020 Cancel Image: System IM Request: AFNExamples, CARLITest IM Pickup Location: Main Stacks External Identifier: 5341619730005899 Request Date: 02/06/2020 Cancel | Moon /CancelEditRequest Type: Patron physical item request ID: 5309482210005899 Creator: System E Request Test, AFN UU E Pickup Location: Main Stacks External Identifier: 5309482180005899Place in Queue 1 Request Date: 11/28/2019CancelEditImage: Cancel |

8. After clicking the "Place in Queue" you can see more information about the priority of the request, the type of patron the requester is, as well as the specific barcode of the item requested. Clicking the barcode will take you to the item information page.

| Gei | nghis Khan | | | | | | | | | | , |
|---------------------|------------------------------------|-------------|---------------------------|---------------------|----------|----------------|--------------|---------------------|-----------|-------------|-----------------|
| Loca Call Max | ation Number imum Active Re | equests | Stacks 950 J41Wli 0 | | | | | | | | |
| 1-: | I - 2 of 2 | | | | | | | | | | |
| | Request Type | Destination | | Current Activity | Priority | Barcode | Request Date | Interested Until | Requester | Description | Requester Group |
| 1 | Patron physical item request | Main Stacks | 5 | - | Highest | 30112100040093 | E 03/31/2020 | - | | - | LIBSTAFF |
| 2 1 | Patron physical item request | Main Stacks | 5 | - | Medium | 30112100040093 | E 04/03/2020 | - | | - | LOCAL HIPRV |

9. Undefined tasks can be canceled, edited, or marked as missing by clicking Edit in the top right corner. Editing options include pick up location and adding notes to the task.

| 1 | | Moon / | | Cancel | Edit | |
|---|------|---|-----------------------------------|--------|------|--|
| | 10 m | Request Type: Patron physical item request | Place in Queue 1 | Binner | | |
| | 2 | ID: 5309482210005899 | Request Date: 11/28/2019 | | | |
| | | | | | | |
| | | Pickup Location: Main Stacks | | | | |
| | | External Identifier: 5309482180005899 | | | | |
| 2 | | Keeping in touch : self, sex, and society / | | Cancel | Edit | |
| | 11 m | Request Type: Patron physical item request | Place in Queue: 1 | | | |
| | 50 | ID: 5341613350005899 | Request Date: 02/06/2020 | | | |
| | | Creator: System | | | | |
| | | Requester: AFNExamples, CARLITest 🔊 | | | | |
| | | Pickup Location: Main Stacks | | | | |
| _ | | External Identifier: 5341613270005899 | | | | |
| 3 | | Population: private choice and public policy; | ; the Essex Hall lecture for 1972 | Cancel | Edit | |
| | 11 m | Request Type: Patron physical item request | Place in Queue: 1 | | | |
| | 50 | ID: 5341619810005899 | Request Date: 02/06/2020 | | | |
| | | Creator: System 🔊 | | | | |
| | | Requester: AFNExamples, CARLITest 🔊 | | | | |
| | | Pickup Location: Main Stacks | | | | |
| | | External Identifier: 5341619730005899 | | | | |

10. Requests or Work Orders with a defined workflow should display with additional information. Along with the creator of the task, who the request is for, and pick up location, you can also see what step of the workflow the item is currently in, its process status, its home library, and what date the item was last processed, as well as when the current task will expire.

11. You can get more information about the task by clicking on the number to the right of "Place in Queue". Tasks in progress should have a "0" by their Place in Queue.

| 11 h | Request Type: Patron physical item request | Place in Queue: 0 | Workflow Step: Pickup From Shelf | | |
|-------|---|--|---|----------------------|----|
| SI | ID: 5455563790005899 | Call Number: 020.713 L888S | Process Status: New | | |
| | Creator: System | Request Date: 04/03/2020 | Managed By Library: Oak Street Library | | |
| | Pickup Location: Undergraduate Library | | Managed By Desk: Oak Street Library | | |
| | | | Process Date: 04/03/2020 | | |
| | | | Expiration Date: 04/10/2020 | | |
| | Working one-to-one with students : supervise | sing, coaching, mentoring, and persona | I tutoring / Gina Wisker [and others]. | Cancel Print Slip | p |
| 11-11 | Request Type: Patron physical item request | Place in Queue: 0 | Workflow Step: Pickup From Shelf | | |
| SI | ID: 5455564290005899 | | | | |
| | Creator: System | | | | |
| | Requester: | | Managed By Desk: SSHEL North | | |
| | Pickup Location: Undergraduate Library | | | | |
| | | | Expiration Date: 04/10/2020 | | |
| | Sir Gawain and the Green Knight. A new ver | se translation / by Marie Borroff. | Canc | el Move To Task List | .t |
| 10 1 | Request Type: Patron physical item request | Place in Queue: 0 | Workflow Step: Pickup From Shelf | | |
| SI | ID: 5455566380005899 | Call Number: 821 G24B01967 | Process Status: New | | |
| | Creator: System 🔊 | Request Date: 04/03/2020 | Managed By Library: Main Stacks | | |
| | Requester: | Note: This is the English translation, | Managed By Desk: Main Stacks | | |
| | Pickup Location: Literatures and Languages Library | right? | Process Date: 04/03/2020 Expiration Date: 04/10/2020 | | |

12. After clicking the "Place in Queue" number, you can see more information about the current activity of the request, the type of patron the requester is, as well as the specific barcode of the item requested. Clicking the barcode will take you to the item information page.

| The Stanford | companion to Victori | an fictio | n / | | | | | | , |
|--|---|-------------------------|----------|----------------|------------------|--------------|-----------|-------------|-----------------|
| Location Call Number Maximum Active Re | Stacks Request PR871 .S87 198 equests 1 | Online 9 | | | | | | | |
| 1 - 1 of 1 | | | | | | | | | ⊳ ¢ |
| Request Type | Destination | Current Activity | Priority | Barcode | Material Type | Request Date | Requester | Description | Requester Group |
| Patron 1 physical item request | Literatures and Languages Library | Pickup From Shelf | Medium | 30112012983620 | Book | 11/15/2019 | - | - | UNDERGRAD |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |

13. Defined tasks can be canceled, have their expiration updated, or have certain details of the task edited. You can also print a pick slip, move the item to a task list, or mark it as missing. All these options can be found in the upper right of the task, though some options may not be available depending on its place in the workflow.

| 1,218 | | The call of the wild / 20th Century Fox ; Jos | seph M. Schenck presents a Daryl Z | anuck production. | Print Slip | Updat | te Expiry | |
|-------|---|--|---|---|---------------------|-----------|------------|--|
| | | Request Type: Transit For Reshelving ID: 5366576850005899 Creator: Pickup Location: Undergraduate Library Barcode: 30112080310706 | Place in Queue: 0 Call Number: DVD PN1997 .C355648 2006 Request Date: 03/05/2020 Material Type: Other | Workflow Step: Transit Item Process Status: In Process Managed By Department: Preservation Process Date: 03/05/2020 Expiration Date: 03/05/2020 | | | | |
| 1,219 | Ş | Genghis Khan, op. 37. Request Type: Patron physical item request ID: 5455218390005899 Creator: Requester: : Pickup Location: Main Stacks Barcode: 30112015692079 | Place in Queue: 0 Call Number: M1245G88 OP.37 Request Date: 03/31/2020 Material Type: Music Score | Workflow Step: Pickup From She Process Status: New Managed By Library: Music and Performing Arts Library Managed By Desk: Music and Performing Arts Library Process Date: 03/31/2020 Expiration Date: 04/07/2020 | Car | ncel P | Print Slip | |
| 1,220 | | Science fiction: the future, edited by Dick A Request Type: Patron physical item request ID: 5455687300005899 Creator: System 🔊 Requester: Pickup Location: Main Stacks | Illen. Place in Queue: 0 Call Number: 808.309 AL5S Request Date: 04/06/2020 | Workflow Step: Pickup From She Process Status: New Managed By Library: Main Stacks Managed By Desk: Main Stacks Process Date: 04/06/2020 Expiration Date: 04/13/2020 | Cancel M If S | Move To T | Fask List | |