

Monitoring Local Requests

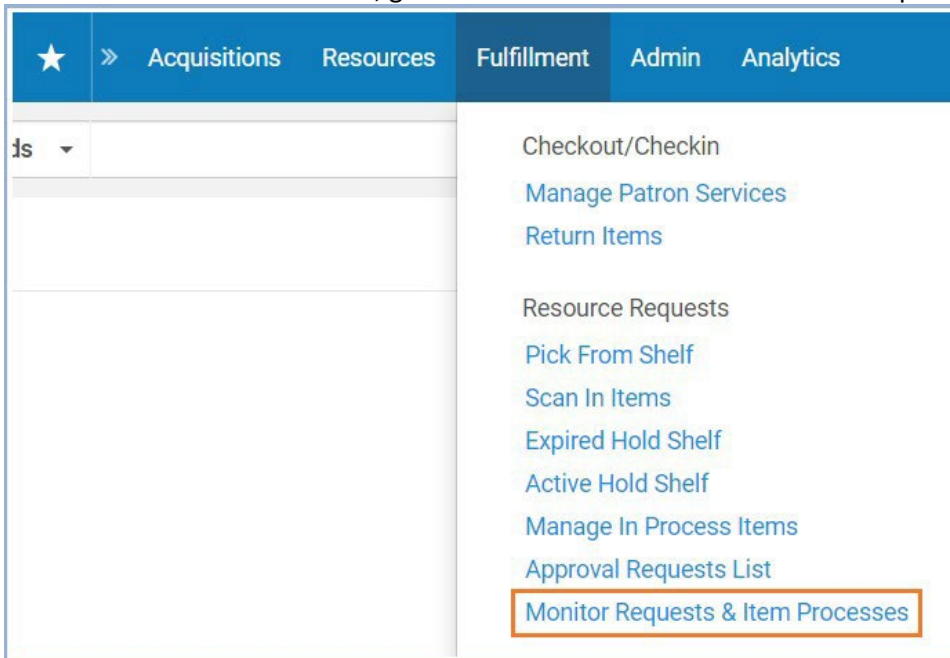
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Alma video: [Physical Item and Move Requests](#)

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.

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.

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

4. Requests or Work Orders can be divided into two categories that can be searched using the facets under Workflow Step:
 - a. **Undefined tasks** 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.
 - b. **Defined tasks** 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.

Undefined



Keeping in touch : self, sex, and society /

Request Type: Patron physical item request

ID: 5341613350005899

Creator: System

Requester: AFNExamples, CARLITest

Pickup Location: Main Stacks

External Identifier: 5341613270005899

Place in Queue: 1

Request Date: 02/06/2020

Cancel Edit ...

Defined



Sir Gawain and the Green Knight. A new verse translation / by Marie Borroff.

Request Type: Patron physical item request

ID: 5455566380005899

Creator: System

Requester:

Pickup Location: Literatures and Languages Library

Place in Queue: 0

Call Number: 821 G24B01967

Request Date: 04/03/2020

Note: This is the English translation, right?

Workflow Step: Pickup From Shelf

Process Status: New

Managed By Library: Main Stacks

Managed By Desk: Main Stacks

Process Date: 04/03/2020

Expiration Date: 04/10/2020

Cancel Move To Task List ...

Facets

Bound Issue (2)

[+ More \(6\)](#)

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 pickup 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 ...
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 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.

1  Moon / Cancel Edit ...
Request Type: Patron physical item request **Place in Queue:** 1
ID: 5309482210005899 **Request Date:** 11/28/2019
Creator: System **Requester:** Test, AFN UIU
Pickup Location: Main Stacks
External Identifier: 5309482180005899

2  Keeping in touch : self, sex, and society / Cancel Edit ...
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 Identifier: 5341613270005899

3  Population: private choice and public policy; the Essex Hall lecture for 1972 Cancel Edit ...
Request Type: Patron physical item request **Place in Queue:** 1
ID: 5341619810005899 **Request Date:** 02/06/2020
Creator: System **Requester:** AFNExamples, CARLITest
Pickup Location: Main Stacks
External Identifier: 5341619730005899

- 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.

Genghis Khan ▼

Location Stacks
Call Number 950 J41Wli
Maximum Active Requests 0

1 - 2 of 2 🔗 ⚙️

Request Type	Destination	Current Activity	Priority	Barcode	Request Date	Interested Until	Requester	Description	Requester Group
Patron 1 physical item request	Main Stacks	-	Highest	30112100040093	E 03/31/2020	-			LIBSTAFF
Patron 2 physical item request	Main Stacks	-	Medium	30112100040093	E 04/03/2020	-			LOCAL HIPRV

- 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 ...

Request Type: Patron physical item request **Place in Queue:** 1
ID: 5309482210005899 **Request Date:** 11/28/2019
Creator: System [\[A\]](#)
Requester: Test, AFN UIU [\[A\]](#)
Pickup Location: Main Stacks
External Identifier: 5309482180005899

2 Keeping in touch : self, sex, and society / Cancel Edit ...

Request Type: Patron physical item request **Place in Queue:** 1
ID: 5341613350005899 **Request Date:** 02/06/2020
Creator: System [\[A\]](#)
Requester: AFNExamples, CARLITest [\[A\]](#)
Pickup Location: Main Stacks
External Identifier: 5341613270005899




3 Population: private choice and public policy; the Essex Hall lecture for 1972 Cancel Edit ...

Request Type: Patron physical item request **Place in Queue:** 1
ID: 5341619810005899 **Request Date:** 02/06/2020
Creator: System [\[A\]](#)
Requester: AFNExamples, CARLITest [\[A\]](#)
Pickup Location: Main Stacks
External Identifier: 5341619730005899

- 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.

Resource Request Monitoring (1 - 17 of 17) Cancel

1	 Request Type: Patron physical item request ID: 5455563790005899 Creator: System [A] Requester: Pickup Location: Undergraduate Library	Place in Queue: 0 Call Number: 020.713 L888S Request Date: 04/03/2020	Workflow Step: Pickup From Shelf Process Status: New Managed By Library: Oak Street Library Managed By Desk: Oak Street Library Process Date: 04/03/2020 Expiration Date: 04/10/2020	Cancel
2	 Request Type: Patron physical item request ID: 5455564290005899 Creator: System [A] Requester: Pickup Location: Undergraduate Library	Place in Queue: 0 Call Number: 371.394 W892 Request Date: 04/03/2020	Workflow Step: Pickup From Shelf Process Status: New Managed By Library: SSHEL Managed By Desk: SSHEL North Process Date: 04/03/2020 Expiration Date: 04/10/2020	Cancel Print Slip ...
3	 Request Type: Patron physical item request ID: 5455566380005899 Creator: System [A] Requester: Pickup Location: Literatures and Languages Library	Place in Queue: 0 Call Number: 821 G24B01967 Request Date: 04/03/2020 Note: This is the English translation, right?	Workflow Step: Pickup From Shelf Process Status: New Managed By Library: Main Stacks Managed By Desk: Main Stacks Process Date: 04/03/2020 Expiration Date: 04/10/2020	Cancel Move To Task List ...

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 Victorian fiction / ▼

Location Stacks Request Online
Call Number PR871 .S87 1989
Maximum Active Requests 1

1 - 1 of 1 🔗 ⚙️

Request Type	Destination	Current Activity	Priority	Barcode	Material Type	Request Date	Requester	Description	Requester Group
Patron 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 ; Joseph M. Schenck presents a Daryl Zanuck production. 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	Print Slip Update Expiry ...
1,219		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 Shelf 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	Cancel Print Slip ...
1,220		Science fiction: the future, edited by Dick Allen. Request Type: Patron physical item request ID: 5455687300005899 Creator: System  Requester: Pickup Location: Main Stacks	Place in Queue: 0 Call Number: 808.309 AL5S Request Date: 04/06/2020	Workflow Step: Pickup From Shelf Process Status: New Managed By Library: Main Stacks Managed By Desk: Main Stacks Process Date: 04/06/2020 Expiration Date: 04/13/2020	Cancel Move To Task List ...