



CARLI

REQUEST FORMS IN PRIMO VE

AS OF APRIL 21, 2021



Topics

- Different kinds of Request Forms in Primo VE
- Configurations
- Labels
- Known Issues



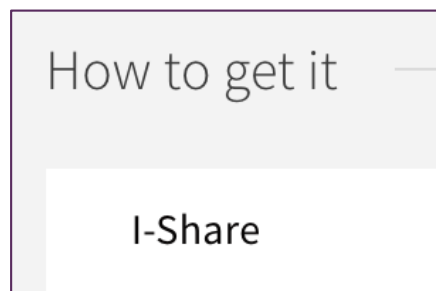
Four Request Forms in Primo VE

- Resource Sharing Request form
- Hold and Booking Request form
- Digitization Request form
- Purchase Request form



Resource Sharing Request form

- Used by the Automated Fulfillment Network (AFN)
- Allows users to place requests for physical inventory from other I-Share institutions
- Settings are managed by CARLI and should not be edited
- Consortial settings documented at:
<https://www.carli.illinois.edu/products-services/i-share/alma/primo-ve/ressharereqform>
- Default label is “I-Share” but your institution may customize that wording

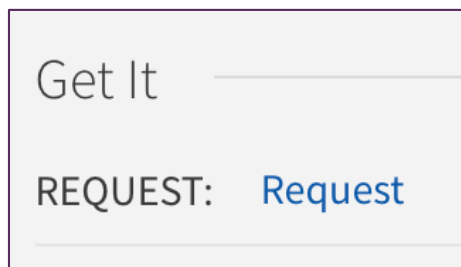


A screenshot of a dropdown menu. The top part of the menu is a light gray header with the text "How to get it" and a small horizontal line to its right. Below the header is a white area containing the text "I-Share".



Hold and Booking Request form

- Form used to start user-initiated local “hold” requests
- Allows your users to place requests for physical inventory from your institution
- Alma Configuration > Discovery > GetIt Configuration > Hold and Booking Request
- Requires the Discovery Admin role to edit
- Your institution may customize this form
- Default label is “Request” but your institution may customize that wording



Get It


REQUEST: Request



Hold and Booking Request form

- Configuring Request Forms for Primo VE:
[https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_\(English\)/080Configuring_Delivery_Services_for_Primo_VE/Configuring_Request_Forms_for_Primo_VE#Configuring_a_Request_Form](https://knowledge.exlibrisgroup.com/Primo/Product_Documentation/020Primo_VE/Primo_VE_(English)/080Configuring_Delivery_Services_for_Primo_VE/Configuring_Request_Forms_for_Primo_VE#Configuring_a_Request_Form)
- Consider turning OFF the “Not needed after” field
- Alma March 2021 Release Notes:
https://knowledge.exlibrisgroup.com/Alma/Release_Notes/2021/Alma_2021_Release_Notes?mon=202103BASE
Section: *Enhanced request cancelation after “date needed by” has passed*

Not needed after

 Pickup Date ▼



Digitization Request form and Purchase Request form

- Alma Configuration > Discovery > GetIt Configuration
- Requires the Discovery Admin role to edit
- Your institution may customize these forms
- Digitization Request and Purchase Request services require additional configuration in Alma
- Default Labels are “Digitization Request” and “Purchase Request” but can be customized by your institution



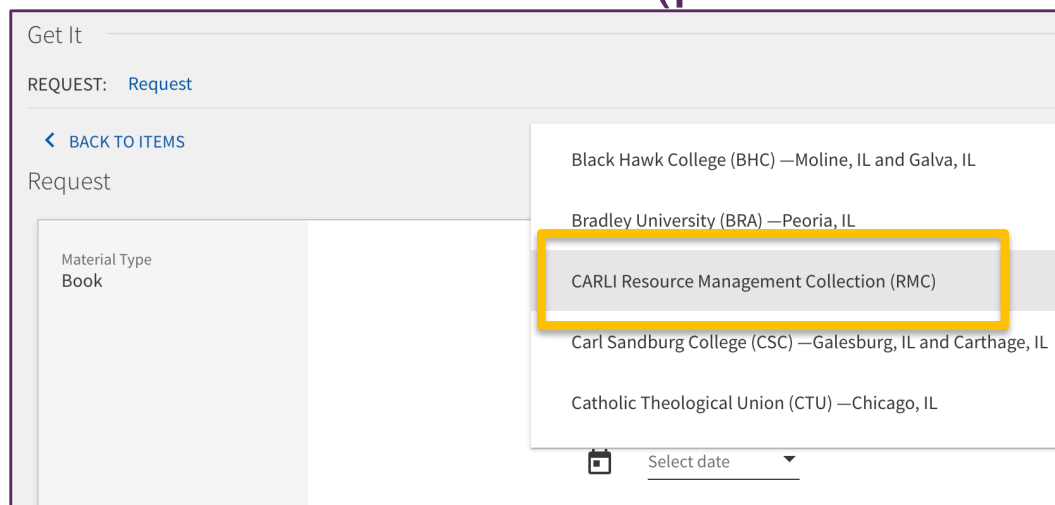
Labels in Primo VE

- Most of the text in Primo VE can be adjusted by customizing the Label Tables
- CARLI's Customizing Primo VE Labels page:
https://www.carli.illinois.edu/products-services/i-share/discovery-interface/custom_labels
- CARLI Resource Sharing in our New Age: Primo VE Configuration & Customization webinar:
<https://www.carli.illinois.edu/carli-resource-sharing-our-new-age-primo-ve-configuration-customizations>



Known Issues with Request Forms

- CARLI Alma/Primo VE Known Issues page: <https://www.carli.illinois.edu/products-services/i-share/alma-primo-ve-known-issues>
- Primo VE *Local Request form* offers pick-up locations where the hold shelf is not enabled (posted 3/15/2021)



The screenshot shows the 'Request' form in Primo VE. The 'Material Type' is set to 'Book'. A dropdown menu is open, displaying several pick-up locations. The 'CARLI Resource Management Collection (RMC)' is highlighted with a yellow box. Below the dropdown is a 'Select date' field.

Pick-up Location
Black Hawk College (BHC) —Moline, IL and Galva, IL
Bradley University (BRA) —Peoria, IL
CARLI Resource Management Collection (RMC)
Carl Sandburg College (CSC) —Galesburg, IL and Carthage, IL
Catholic Theological Union (CTU) —Chicago, IL

- The I-Share request link in Primo VE may display when there are no holdings at other institutions (posted 3/15/2021)



Thank you for watching!

