Alma Essentials: Fulfillment

MOVE REQUEST MANAGEMENT

Hello, in the last session you learned how to create move requests for physical items, now let's look at how to manage move requests and monitor their processes in Alma; as well as how move items without having to place a request, and restore temporarily moved items.

The process of managing a move request is essentially the same as for managing a patron physical item request.

You have a request for an item that is going to be put on a display at another library. If the item is currently on the shelf, the request appears in the "Pick from Shelf" list. To see this list you'll go to Fulfillment > Pick from Shelf, and you can use the facets to filter to only see a particular type of move request.

Once you've picked the item from the shelf it's ready to be scanned, you'll go to Fulfillment > Scan in Items. Let's scan it in… In this example Alma indicates that the item is being put in transit to a different library for a temporary move.

Upon arrival at the new library it is scanned in at the circulation desk on the "Scan In Items" page, and Alma will indicate the next step as "Reshelve" and the item status will be updated to "In Place".

You now have an item in hand that needs to be permanently moved to a new location at the Graduate Library, from the Science Library. Since you already have the item in front of you, you aren't required to create move request to change the item's location.

On the Scan In Items page you'll click the "Change Item Information" tab. Now you can select that the change type is Permanent, the new location, and item policy, if necessary. Now scan in the barcode. Alma will update the item's location immediately without creating a move request.

You also have the option to move items temporarily on this tab. For example: if you have identified items that need to be moved temporarily and have already pulled them from the shelf. On the Change Item Information tab choose the type of Temporary, select a new location, set the due back date, and update the item policy, if necessary, and scan the items

Please note that that you can change the library and location for a set of items by running a "Change Physical Items" job. For more information about jobs please watch the Fulfillment Sets and Jobs tutorial.

When it's time for temporarily moved items to be sent back to their permanent locations, and you have the items in hand, you'll go to Fulfillment > Scan in Items, and choose the "Change Item Information" tab.

Now you can choose "Restore" from the drop down and check the box if you want Alma to check for any requests on the item, scan in the barcodes.