

## Configuring Requests

### Note

This page covers the configuration of requests including request pickup rules, request type priorities, additional personal delivery locations, etc.

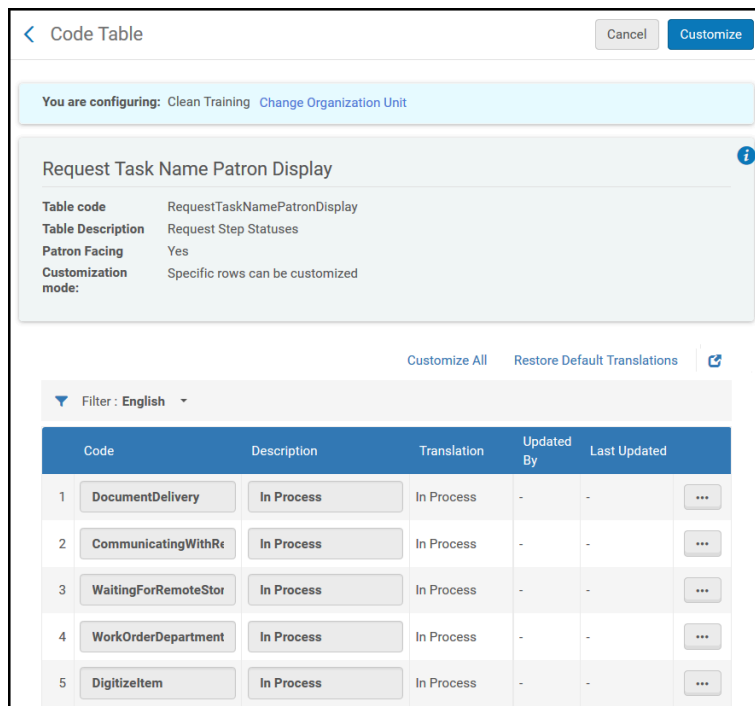
For links to all the main fulfillment documentation pages see [Fulfillment](#).

## Configuring Request Task Names

To configure request task names, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can customize the names of request statuses in your Primo My Account using the Request Task Name Patron Display Code Table page ([Configuration Menu > Fulfillment > Physical Fulfillment > Request Task Name](#)).



Code Table

You are configuring: Clean Training Change Organization Unit

Request Task Name Patron Display

Table code: RequestTaskNamePatronDisplay  
Table Description: Request Step Statuses  
Patron Facing: Yes  
Customization mode: Specific rows can be customized

Customize All Restore Default Translations

Filter: English

Code	Description	Translation	Updated By	Last Updated
1 DocumentDelivery	In Process	In Process	-	-
2 CommunicatingWithRe	In Process	In Process	-	-
3 WaitingForRemoteStor	In Process	In Process	-	-
4 WorkOrderDepartment	In Process	In Process	-	-
5 DigitizetItem	In Process	In Process	-	-

### Request Task Name Patron Display Code Table Page

### Note

Request statuses can be configured at the institution level only. Select the required institution from the **Configuring** filter on the Fulfillment Configuration page.

## To customize request task names:

1. On the Request Task Name Patron Display Code Table page ([Configuration Menu > Fulfillment > Physical Fulfillment > Request Task Name](#)), modify the values in the **Code** and **Description** fields for the relevant status in the Request Step Statuses table.
2. Select **Customize**.

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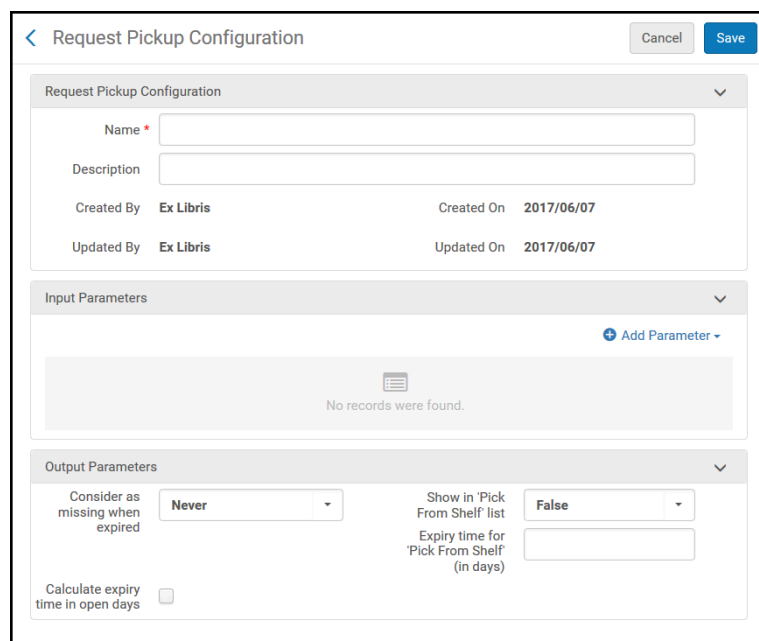
## Configuring Request Pickup Rules

To configure request pickup rules, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

A library can configure rules that determine how different aspects of request workflows are managed. Using these rules, libraries can better control how and when requests expire, how they appear on the pickup shelf, and whether the item is to be considered missing if it was not fulfilled within a specified number of days.

1. On the Request Pickup Configuration page ([Configuration Menu > Fulfillment > Physical Fulfillment > Request Pickup Configuration](#)), select **Add Rule**. The Request Pickup Configuration page appears.



### Request Pickup Configuration Page

2. In the **Name** field, enter a name for the request pickup configuration rule.
3. In the **Input Parameters** section, specify the components of the input parameters (**Name**, **Operator**, and **Value**). A set of input parameters may look like this: `User Group = Graduate student.`

The available **Name** input parameters are:

- Location
- Request Type
- User Group

4. In the **Output Parameters** section, specify the following parameters that are to apply to the indicated **Location**, **Request Type**, or **User Group**:
- **Consider as missing when expired** - Whether the requested item is considered missing if it is not fulfilled within a specified number of days.
    - **Only when expired not due to Date Needed by** - Relevant if the rule is set so that the expiry of the request will also trigger marking the item as lost. The expiry of the request can happen either because the defined period of time has elapsed (default is a week) or because the last interest time arrived - the shorter of the two. In the first case, it means that the library has tried to fulfill the request for some time but could not find it. In the latter, it means the request expired just because the patron is no longer interested, but it could be that the library could fulfill the request.

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#### Note

The **Only when expired not due to Date Needed by** option can be used to say that an item should be considered lost only in the first case (which indicates the library could not find the item) but not in the second.

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- **Show in 'Pick From Shelf' list** - Whether the requested item appears on the Pick From Shelf list.
- **Expiry time for 'Pick From Shelf' (in days)** - The number of days after which the request is considered expired. For example, if you specify 5 in this field, once a requested item is not picked up within 5 days, the request is considered expired. If you do not specify the expiry time, the default is 7 days.
- **Calculate expiry time in open days** - allows the number of days before a request is expired to be calculated for open days only. For instance, if the rule is 7 days but that calculated date is a closed day and the check box is selected, the Pick From Shelf task will expire on the next open day. If the check box is deselected (which is the default), the Pick From Shelf task will expire on the closed day.

When the item's expiration time arrives, the **Requests – Handle Expiration Step** job cancels the requests (see [Viewing All Scheduled Jobs](#)).

5. Select **Save**. The rule appears on the Request Pickup Configuration page.
6. If you defined more than one rule, use the Move Up and Move Down arrows to set the order of the rules. The order of the rules is important, since Alma applies the first (and only the first) appropriate, enabled rule.
7. Rules may be enabled or disabled in the **Enabled** column.
8. Select **Calculate Existing Requests Retroactively**. Alma retroactively applies the rules to existing requests. Otherwise, rules are applied only to requests created after the rule was enabled.

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#### Note

If no rule is configured, the item is always considered as missing when expired.

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## Configuring Request Type Priorities

To configure request priorities, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

The Request Priorities mapping table allows you to configure the priorities for each of the different library request types. It is accessed at **Configuration Menu > Fulfillment > Physical Fulfillment > Request Priorities**.

Mapping Table

You are configuring: Main Campus [Change Organization Unit](#)

Request Types Priorities

Table Description: Request Types Priorities  
Customization mode: Specific rows can be customized

Request Type	Priority	Updated By	Last Updated
1 Library physical digitization request	Medium	-	-
2 Move permanently	Highest	-	-
3 Move temporarily	Highest	-	-
4 Ship digitally	Medium	-	-
5 Ship physically	Highest	-	-
6 Restore item	Highest	-	-
7 Staff digitization request	Medium	-	-
8 Work order	Highest	-	-

## Request Priorities

### To configure request priorities:

1. On the Request Priorities page, select **Customize** from the row actions list of the message that you want to configure.
2. Select the new priority in the **Priority** field. Repeat these two steps for all messages that you want to configure.
3. When you are done, select **Save** to save your changes.

The available request types are:

Request type	Meaning
Library physical digitization request	A digitization request placed from a reading list
Move permanently	Request for a physical item to be moved to a new location
Move temporarily	Request for a physical item to be temporarily moved to a new location
Ship digitally	An internal digitization request placed by resource sharing staff
Ship physically	An internal physical item request placed by resource sharing staff
Restore item	Restore an item from a temporary location

Request type	Meaning
Staff digitization request	Staff digitization request
Work order	Work order request

## Configuring Additional Personal Delivery Locations

To configure request priorities, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Patrons that are eligible for personal delivery can request to pick up resources at address other than their registered home/office address. This enables using the personal delivery service, even when no known home/office address has been uploaded to the system.

### To Add a New Personal Delivery Location:

1. Navigate to **Configuration > Fulfillment > Patron Configurations > Additional Personal Delivery Address Types**.
2. Enable the relevant delivery location and update the description.

#	Enabled	Code	Description	Translation	Default Value	Updated By	Last Updated
1	<input checked="" type="checkbox"/>	P_DELIV_ADDRESS_7	Dormitory	Dormitory	<input type="radio"/>	ex_l_impl	06/08/2023
2	<input type="checkbox"/>	P_DELIV_ADDRESS_2	Personal delivery address type 2	Personal delivery address type 2	<input type="radio"/>	ex_l_impl	17/07/2023
3	<input type="checkbox"/>	P_DELIV_ADDRESS_3	Personal delivery address type 3	Personal delivery address type 3	<input type="radio"/>	ex_l_impl	17/07/2023

3. The new delivery location appears in the **Pickup At** field on the Create Request page (see [Supporting Personal Delivery Requests](#)) if the patron is eligible for personal delivery.

The screenshot shows the 'Create Request' form with the following fields:

- Request Type \***: Patron physical item request
- Requester \***: Staff, Ex Libris
- Note**: (Empty text area)
- Pickup At \***: A dropdown menu with a search bar containing 'Look-up or select'. The dropdown is open, showing 'Personal Delivery' as the selected category. Under this category, 'Home Delivery' and 'Dormitory' are listed. 'Dormitory' is highlighted with a red box.
- Additional Request Attri**: (Partially visible)
- Material Type**: (Partially visible)

It also possible for patrons to easily change the registered home/office address in PrimoVE when requesting for personal delivery.

See [Setting Personal Delivery Locations from Hold Request Form](#) for more information.