Requesting Special Collections Material in Alma

This document contains step-by-step instructions and other helpful information specific to using Alma Fulfillment in Special Collections

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Requesting items in Alma

Decision matrix for request types

Requesting for	Request Type	Requestor	Scan-In
Processing	Patron Physical Item Request	Staff member making request; add a note to help identify the uses for the boxes	Register in house use

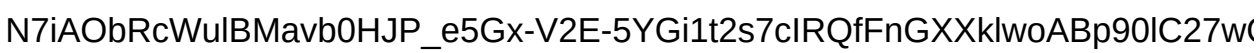
Patron on site	Patron Physical Item Request	Patron: existing user, create new, GW, or search for WRLC user; consider adding a note if the patron has made an appointment with the date	Place directly on hold shelf, print slip, physically place items in hold room according to last name

Remote Reference Patron Physical Item Request
Staff member making request; add a note with the patron name
Place directly on hold shelf, print slip, shelve with staff holds

Class Instruction or event
Patron Physical Item Request
Special Collections Instruction account; add course name/info/date of class in the notes field
Place directly on hold shelf, print slip, add class info and date (?) /staff name, shelve with instruction holds

Steps for requesting books or boxes in Alma

- **The request begins from the item**:
  Search the item in Alma; typically the most efficient way to find a specific item (especially for boxes) is to search for **Physical Items by Barcode** (shown below)



- Once you identify the correct item click “request” and select **“Patron Physical Item Request**” as the request type from the dropdown menu (shown below)
- Enter the name of the “**Requestor**” (see the matrix at the top of this section for specifics about who the requestor should be based on the request type); **select “Special Collections” as the “Pickup At”** location; click **submit.** (shown below)

:OSNlbcMiTv3YWO_n0hr2MHM4wERchTTF4m7qOMC0VwOgA9LZkO-VVcCFI-c2_vE_I_L

Tracking requests once placed

There are a few ways you can check the status of items that have been requested.

1. **Clipboard -** Requested items that live on site and need to be paged will appear in our **“pickup from shelf”** list.

You can access this by clicking on the “clipboard” icon on the top right of

OA-loAwbc6PrJ6YYt-tGK

your screen.

Select “Pickup from Shelf” to access the queue of outstanding requests to be paged. (Shown below)

Fi8sY63Bh41cOBF3o3mY7WXegN

You can print call slips directly from the Pickup from shelf queue. Print two: one for the item and one as a shelf marker to indicate that something has been removed from the shelf.

2. **Widget** - A widget that shows the status of the most recent two weeks of requests can be added to your Alma dashboard. It updates every 24 hours, not in real time.

To add this and other widgets, click on the tiny plus sign (+) found on the upper right side of the Alma home screen. A window with options for different widgets pops up. Select the ones you want and save.

Image below shows the widget for SCRC requests:

n5LZfCAp0hdgTp4piWpY2LD520UArhruPFEiWQXJx9_kQloYD6nnGWVhS2-2BHaUrvj

3. **Monitor active requests** (on site and remote storage, in real time)

   Follow this path: **Fulfillment > Monitor Requests & Item Processes**

   Refine the results by Pickup Location and select Special Collections and you can then refine this by material type and see just boxes or books.

4. Look up a specific patron to see their requests.

   Follow this path in Alma: **Fulfillment > Manage patron services**
   Search and locate the patron by name and click “ok”

In the next screen select the “requests” tab to see a list of requests for a specific patron.

Scan-in

Using the **Scan in** function will change the Alma status for the item from Requested to Hold Shelf signifying the book is on hold for the patron. This also triggers an automatic notification email to be sent to the patron, alerting them that their item is in the reading room and ready for use.

Before you scan-in items make sure your scan-in screen has the proper radio buttons checked (screen shot:)
TP2lGFYx03aahVF4ht0XlK_bnXFasCll64X3ELll5zHIhXc0XSO4nerXfDpbwJwwq

Basic steps to scan in items:

? Follow this path in Alma: **Fulfillment>Scan In** and then scan the barcode for each item that has been delivered or paged.

? A window will pop up on the right side of your screen. Any notes added to the request will be displayed here. Notes often include class information or the date of the patron’s scheduled visit, or information regarding a remote request.

? **Print a call slip for each item that you scan in**. Select “**quick print**” in the pop-up window that appears on the right of your screen after you scan in each barcode. This action will generate a PDF that you must then send to the printer. (image below)

? We print the call slip so we have the patron’s name on the item in order for boxes and books to be shelved correctly and quickly located once the patron is in the reading room. ? Boxes and books on hold for patrons should be shelved in 704x alphabetically by last name.
? Boxes for staff or remote reference can go on the shelves designated in 704x[1]
? Boxes for class instruction are usually grouped together on a cart with a note on the cart indicating the class number, date of the class, and instructor’s name

Steps for circulating books and boxes in Alma

Circulating items in the reading room begins with the patron name/ID
Follow this path: **Fulfillment > Manage Patron Services**

? Search the patron name to locate their record; click “GO” when you find the correct user. (You can scan the barcode on a GWorld card to locate a GW user)

Z-lYvF-KnuJDuTvb0Yx652SgWfylKdfuzjPF8whk88KoV8Yn_FowD0I7DNl

? Scan the barcode on the box that the patron would like to use; the box is now checked out to the user for reading room use.

YvVmCGX3jR4c4Zq-nES35qbctqBF3SAmatLxPsCJLHgEV1W1znVE

Returning items: keep on hold, place in transit, and reshelve

There are several different options for routing books and boxes that have been circulated for a patron.
Here are the most common and the corresponding steps in Alma:

Patron wants to/is:	**Alma path**	**Alma action**	**Where to put the item**	**notes**
Keep on hold box or book	Fulfillment>Active Hold Shelf > Held by patron	Click “receive from patron”	Replace call slip on item and shelve in 704x (alphabetic ally by last name)	

[1] Subject to change based on space availability

Done with box that lives off site	Fulfillment>Return items	Scan barcode (screenshot below) to mark the item as final and place it in-transit to WRLC	Place on carts to be strapped and stored in B05c	
Done with box or book that lives on site	Fulfillment>Active Hold Shelf > Held by patron	Click “receive from patron”	Place on appropriate shelf or cart to await reshelving	Items will be scanned as final when the item is reshelved
Done with a Book that lives off site	Fulfillment>Active Hold Shelf > Held by patron	Click “receive from patron”	Place on “return to wrlc” shelf. public services staff will regularly bring books to designated place (access services).	Items will be scanned as final and taken down to circ desk (this step completed by public services; have public services librarian train before doing this step).

If there is another patron request for the same item, a window will pop up indicating the active request and the name of the patron **when you scan a box or book for a final return**.

Visual for **Fulfillment > Return items**
EbSObuN6CJlTfkwal9vp5sBvBzsnNkuDA23rT2jqlXHJl0jB0cBsflFmv7-4OKqEk6bb6A8

Circulating items for classes

Circulate items to the Special Collections Instruction account each time a class uses these items. If a class is meeting multiple times over the semester and using the same items, circulate the items at each class visit. This can be done by the staff person leading the session before or after each class. Essentially we circulate the box and then receive it back so it returns to the hold shelf in Alma.

As with researchers, circulation starts from the patron's account.
Follow this path: **Fulfillment > Manage Patron Services**
In the field where you are prompted to scan the patron's ID or search for a patron's name enter "**Special Collections Instruction".**
Scan the barcodes for all the items to be used that day.
The next step is to receive the item from the patron.
Follow this path: **Fulfillment > Active Hold Shelf > Held by patron (tab)**
Click on the **"receive from patron"** option (right) for each item or select each item using the radio button next to each item and select "receive from patron" at the top of the queue.

Create New User Accounts

New users are non-GW patrons who are also not affiliated with a WRLC school. WRLC users have accounts in Alma; search under "manage patron services" to confirm a WRLC-user account. (instruction in next section to search for WRLC patrons.) To create a new account
Follow this path: **Fulfillment > Manage Patron Services**
Select "**register new user**" on the upper right of your screen

Eu_5Zaj31ZfVKaGh1v9JCyhRMFP4sbfs48iHxDGUhz3T0kfOP5IH_fVLEpJer-ofArCgT_3VE(

Use the following fields for a new user account:

? First Name, Last Name
? User group = gw spec visitor
? Email address

Search for WRLC Users

If a WRLC user has previously checked out materials from GW libraries their account should appear in the standard patron search.
If not you can do a more in-depth search to locate their record.

? Follow this path in Alma: **Fulfillment > Manage Patron Services**
? Check the box for “Find user in other institution”
? In the next field below “Institution” open the dropdown menu to select the WRLC institution from the list. (image below)
? Input the patron’s name in the next field “Scan patron’s ID or search for patron” ? Click “GO”

IpgeQWSuPR-Z2RQ1INqvMSitsAWb7O8C6cytMIZMLfYvcXeIU63D

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