

Fulfilling Requests Exercises

Objective: At the end of these exercises, the learner will be able to identify the main elements of a request in the Pick List, use facets to sort the Pick List, fulfill requests, and know what to do if a requested item is not found on the shelf.

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Exploring the Pick List

Objective: At the end of this exercise, the learner will be familiar with the elements of the Pick List (also known as the Pick From Shelf List).

Exercise: Complete the following steps using the Alma documentation “Fulfilling Requests” located here:

<https://www.library.illinois.edu/staff/wp-content/uploads/sites/24/2020/05/Fulfilling-Requests-1.pdf>

1. In your unit library’s Pick List, identify one request from a UIUC patron and one request from an I-Share patron. (The one from an I-Share patron should have a Fulfillment Network Borrowing ID.)
2. Select one of the requests on the list and write down:
 - a. The item call number
 - b. The pick-up destination
 - c. The requester name
3. Explore the facets in the sidebar. See if you can use the facets to narrow down the list to a single item. Remove facets so that you have returned to the full list.

Fulfilling a Request

Objective: At the end of this exercise, the learner will be able to fulfill a request, from its appearance on the Pick List to putting it on the Hold Shelf (or sending it to the pick-up location for them to put on their Hold Shelf).

Exercise: Complete the following steps using the Alma documentation “Fulfilling Requests” located here:

<https://www.library.illinois.edu/staff/wp-content/uploads/sites/24/2020/05/Fulfilling-Requests-1.pdf>

1. Find an item that is owned by your unit library, but doesn't have any copies in other UIUC unit libraries.
2. Submit a request for that item in Alma on behalf of dummy patron Fozzie Bear (barcode 20112000204338). Include a note that says, “This is a test. Please do not fill this request.” Select a UIUC pick-up location.
 - a. For instructions on placing a request, see the Alma documentation [Requesting Local Items on a Patron's Behalf](#).
3. Print the Pick Slip from the Pick List. Observe what information is and is not included on the Pick Slip regarding the item and the requester.
4. Retrieve the book.
 - a. For this exercise, you can just find the barcode in Alma instead.
5. Open the Scan In Items screen and make sure that you have selected the recommended settings for the available options on that screen.
6. Scan in the item barcode in the Scan Item Barcode field.
 - a. For this exercise, you can just copy and paste the barcode and click “OK” instead.
7. Print the Hold Slip or Transit Slip (depending on what you chose for a pick-up location). Observe what information is and is not included on the slip about the item, the item's destination, and the requester.
8. Normally you would put the slip in the item and put it on your Hold Shelf or send it through Shipping to the appropriate pick-up location. In this case, since it's just for an exercise, go ahead and see it through to the end of the process by checking the item out and back in.
 - a. Check the item out to the patron. (This should be possible regardless of which UIUC unit library you chose as the pick-up location.) For instructions, see the Alma documentation [Loan Items to UIUC Patrons](#).
 - b. Check the item back in. For instructions, see the Alma documentation [Return Items](#).
9. Appropriately dispose of any slips that you printed, shredding anything with patron information.

Reviewing the Not On Shelf (NOS) Process

Objective: At the end of this exercise, the learner will know where to find the necessary information for processing a request that wasn't found on the shelf.

Exercise: Complete the following steps using the Alma documentation "Fulfilling Requests" located here:

<https://www.library.illinois.edu/staff/wp-content/uploads/sites/24/2020/05/Fulfilling-Requests-1.pdf>

1. Choose a request in the Pick List and use it to practice the NOS process. This request can be from either a UIUC patron or an I-Share patron. Write down the steps you *would* take, but don't actually take those steps in Alma.
2. Make note of identifying information about the requested title to help with later steps.
3. Determine if the patron is a local or I-Share patron.
4. Use Alma and/or Primo to see if there's a copy of the item available in another UIUC unit library. If there isn't, see if there's a copy available in I-Share.
5. Write down the list of necessary information about the request, and use that to determine which steps you would take. (The Quick Reference Table may help with figuring that out.)
6. Write down the steps that you would take if the item was NOS, and which screen(s) in Alma you would use to do them.