

Configuring Request Forms

Welcome to this training session on Alma and Primo VE Integration

In this session, you'll see how to configure the various types of request forms available in Primo VE, including holdings requests, booking requests, digitization requests, purchase requests, and resource sharing requests.

Primo VE enables users to fill out various request forms so that they can provide additional information when requesting an item with the Full Display or Services page in Primo VE. The displayed request types are based on the inventory type of the record and display logic rules.

To configure a request form, open the form you want to configure.

In the Display to Public column, select Yes or No for each field.

In the Default column, specify a default value for the field if necessary. An empty field indicates that there is no default value for the field.

Then select Save to save your changes to the mapping table.

To configure the Resource Sharing Request form, go to the Resource Sharing Request Form page, select the Mandatory check box if the user must specify this field in the form.

Select the Visible check box if you want this field to appear on the form as well.

In the Default column, specify a default value for the field if necessary. An empty field indicates that there is no default value for the field.

Select Save to save your changes to the mapping table.

And that is how Request Forms are configured in Primo VE!

Thank you for watching!