Alma Essentials: Fulfillment

DIGITIZATION REQUEST MANAGEMENT

Hello, in the last session you learned what digitization requests are and how to create them. In this tutorial you'll learn how to find and monitor requests, as well as how to fulfill them.

You need to check on the status of a digitization request; there are a couple of ways to do this.

If you know the Request ID or patron name you can use the persistent search bar. Select "Requests" from the search dropdown, and then the correct search index. In this case you know the Request ID, then click search... and here's the request.

To see a list of all active digitization requests you can go to "Fulfillment" > "Monitor Requests & Item Processes"... and then use the facets to filter to only see current digitization requests. Here you can see basic information about each request, as well as have the ability to cancel, edit, or mark the item as missing.

To fulfill a digitization request an item is picked from the shelf, scanned in at the circulation desk, and then put it transit, if necessary, to the Digitization Department.

You're currently in the Digitization Department, and upon the items arrival it is scanned in on the "Scan in Items page"

Digitization requests may require approval and copyright clearance. This is dependent on the configuration of your Digitization Profile Rules.

A digitization request can be approved by going to Fulfillment > Approval Requests List... or from the task list. Each request needing approval is listed. You can see that these requests are waiting for Copyright Clearance.

To approve, open the row action tool and select "Work On". Here you can enter in the copyright information, and then click "Approve" when you're done. You'll then be prompted to select the approval reason... then click "Submit".

Please note that approval can be done later in the workflow, but the email with the digital file cannot be sent to the requestor until approval is completed.

To finish processing the item you'll go to Fulfillment > Manage In Process Items. The "Request/Process Type" column will show you whether it's a partial or full digitization request.

Now the item is digitized. To upload the file for a partial digitization request you'll open the row action tool and select "Next Step". The status will change to "Document Delivery". Now you'll open the row action tool again and select "Attach Documents".

When the page loads, you'll click "Add Attachment", and locate the file on your computer to upload, or enter a URL to access the document. The requestor will receive an email with the file or link. After you attach the file, click "Done".

If your institution has Alma Digital and the item being digitized needs to be added to your institution's repository, such as for a full digitization request, you'll follow a similar process. After clicking "Next Step" from the row action tool the Status will then change from "Digitization" to "Digital Inventory".

Open the row action tool again and choose “Add Digital Inventory”…”. Make sure the “Remote” checkbox is deselected if your institution is maintaining all digital resources it creates within Alma. Select the applicable “Usage Type” and “Library”, as well as add an “Access Rights Policy” if needed.

For more information about these fields please visit the Alma Documentation “Managing Digital Resources” page in the Knowledge Center.

Now you’ll upload your files and click “Save” when you’re done. The item will be added into your institution’s repository for others to access, such as through Primo; and the requestor will be notified that the digitization is available for access.

Once the digitization request is completed the item is routed back to the Circulation Desk where it is scanned in… and put in transit back to its permanent location.