Items in Fulfillment Functions

- View an Item's Loan Status
  - From the Patron Record
  - From a Search for the Item
- View an Item's History
- Mark an Item as Missing
  - Missing vs Lost
- Make Temporary Item Changes

This page reviews working with item records (for Physical items) for Fulfillment purposes. For general information about item and holdings records, read the Items & Holdings section of the Alma wiki.

View an Item's Loan Status

From the Patron Record

If you are in a patron's record, change the Loans tab display to All Loans, look for the item you're interested in, and look at its current status.

From a Search for the Item

1. Use the persistent search bar to conduct either a Titles or Physical Items search
   1. Choose search type Physical Items, search criteria of Title (or whatever information you have), and type in your search term
      1. The results will show all item records matching your search
      2. Look for the item Status and a Process Type.
         1. If the Status is Item in place, it's in place on the shelf. There will be no Process Type.
         2. If the Status is Item not in place, the Process Type will tell you where it is. If it's on Loan, there will be a Due Date in the record.
   2. Choose search type All Titles or Physical Titles, search criteria of Title (or whatever information you have), and type in your search term
      1. In the results list, find the title you're looking for and click on the Physical (holdings) tab. It will show the number of available items.
      2. For more information, click on Items below the Physical tab information, or choose Items from the row action item list icon (the ellipsis)
      3. Each item will appear in a row, with a Status column and a Process Type column. Again, there will only be a Process Type for items with Status = Item not in place.
         1. If the Process Type field doesn't appear as a column, clear on the gear icon to the upper right of the list and put a check next to Process Type
   2. No matter how you get to the item information, if an item is on loan, you can click the word Loan link to see loan details, including patron name and due date.

View an Item's History

The easiest way to view an item's history - item record changes or loan history - is to start with the item record.

1. Use search type Physical Items, criteria Barcode, and type or scan in the item barcode. If you do not have the barcode, use whatever information you have as the criteria to search with.
2. Click on the item barcode (a blue hyperlink) or choose Edit from the row action item list to go to Physical Item Editor
   1. You won't actually be able to edit an item record if you don't have adequate permissions or you're not set to the owning location, but anyone can view any item's history
3. Select the History tab
4. There are three possible types of history to view:
   1. Item Changes (this is the default view)
      1. Displays New value and Old value of changes to the item record
      2. Includes changes in Process type, so it is one way to see some loan information
   2. Holdings Changes - changes in owning library or location
   3. Fulfillment Activities
      1. Displays complete information about loans and returns – Desk name, Operator, Date, Borrower name, Borrower ID
Mark an Item as Missing

Use this workflow when a patron walks up to a desk to indicate an item is not available on the shelf, or if staff are not able to locate an item on the shelf that should be there. There is a different method for other workflows, such as Harvard Direct processing.

You will only be able to mark items as missing for items at the library you’ve selected under current location (upper right of screen).

1. Use the search type **Physical Titles**, the search criteria **Title** and type in the title. Alternately, use whatever information you have about the item, including barcode.
   1. **Note:** For this action, you must use a Physical Titles search. You can’t toggle missing status from the item search results.
2. In the results list, find the title you’re looking for and click on **Items** below the Physical tab information, or choose **Items** from the row action item list icon (the ellipsis)
3. Find the item to be marked missing, click on the row action item list icon, and select **Toggle Missing Status**
   1. If your **Current location** is different from the library that the item belongs to, you can’t mark it missing. Make sure you’re “at” the correct location.
   2. You also can’t mark an item as missing if the item **Process Type** is **In Transit**.
4. In the List of items, the **Process Type** column for your item now says **Missing**.
5. To mark an item as not missing, repeat this process and select **Toggle Missing Status** again. The item **Status** will be **Item in place** and there will be no **Process Type**.

Missing vs Lost

There are two process types that indicate an item whose current location is unknown:

- **Missing** should be used for items not found on the shelf by either staff or a patron, when the item **Status** is **Item in place**
- **Lost** refers to items that were on loan to a patron that are either significantly overdue (and assumed Lost) or declared as Lost by the patron. For more on marking items as Lost, read the **Claimed Return & Lost Items** documentation. **Note:** items can only be declared lost while they are on loan to a patron.

Make Temporary Item Changes

These instructions refer to making changes within a library, when these conditions are met:

- You are on-site, at the location where the item will now be shelved
- You have the piece in-hand

To change an item to a Temporary Location:

1. In the **Current Location** in the upper right corner, select the library to which the item is to be temporarily moved
2. Go to **Fulfillment >> Scan In Items**, but don't enter the barcode yet
3. Click on the **Change Item Information** tab
4. Select the desired **Change Type** from the drop-down (“Temporary” is the default)
5. Select or enter a **Due Back date**; on that date, Alma will generate an automatic restore request
6. Select a **Location** (collection) to move the item to
7. Select an **Item Policy** from the drop-down
8. Change **Call number type** and enter **Call number**, if needed
9. Select a Reading list to which the item should be added, if relevant for course reserves
10. **Important note:** Before scanning the barcode, make sure there is **nothing** in the **New Barcode** field, including an empty space.
11. In the **Scan item barcode field**, scan the barcode to complete the temporary location change
12. Update your current location as needed to continue your work