Sending Items to Offsite Storage

- New Acquisitions
- Existing Holdings and Items - Item in hand
  - For Fulfillment Staff
  - If Changes to the Holding Are Needed
  - For Staff at Tech Services Departments
- Item Not In Hand - the Pick-list Method for Individual Item Records
- What Happens Next?

New Acquisitions

If the holding / item is given the offsite storage location code during the Acquisitions workflow (i.e. while it is still in the Tech Services Department), it will automatically be transited to offsite storage when the work order is marked as Done. The item will be In Place when it is scanned in at remote storage.

If the new material is being added outside the acquisitions process (e.g. a gift for which there is no POL):

1. Create the holding and/or item with the offsite storage location. See Creating Items or Creating Holdings for more on these processes.
2. At this point, the item status is Item in place (at offsite storage).
3. Go to Scan in Item > Mark as Done > OK.
4. This will put the item at status Transit for reshelving and you send it to remote storage.

Existing Holdings and Items - Item in hand

For Fulfillment Staff

To move items on a holding to an offsite storage holding:

1. Ensure you are Currently at the Circ Desk of the owning library
2. Go to Scan in Items, then choose the Change Item Information tab
   a. Change Type: Permanent
   b. Location: (HD/RD)
   c. Scan Item Barcode
   d. Important note: Please make sure there is nothing in the New Barcode field, including an empty space. If there is anything in this field, it will make those characters the new barcode. If there is a space (which you won’t see, of course), Alma will convert this to a NULL as the new barcode, effectively stripping any barcode from an item record. If you click into the New Barcode field so that you leave any invisible space, Alma will accept the space as part of the new barcode. These errors makes it impossible for you to search for the item and impossible for HD or ReCAP to accession the item. To prevent such problems, TAB into the New Barcode field rather than click in it.
3. This process will create a holding if one does not exist for that location
4. The item will automatically be placed In Transit to the offsite storage depository
5. If you moved the last item on a holding, Alma will automatically delete the holding

Always confirm you are Currently at the owning library. If you do this workflow when Currently at a Circ Desk for a different library (not the owning library), this workflow will change the item’s library to the library you are currently at (and create a new holding for that library in the process).

If Changes to the Holding Are Needed

To change an existing holding and all its items to an offsite storage location:

1. Open the holding in the MDE, make any other changes, and change the holdings 852 $c to the offsite storage location. Save and release the holding.
2. The linked items now have Offsite storage as a location. At this point, the item says Item in place (at offsite storage).
3. To put the item In Transit for reshelving:
   a. Fulfillment staff who are Currently at Circ Desks can use Return Item
   b. Staff in other departments with different Currently at locations should use Scan in Items > Done
For Staff at Tech Services Departments

For staff not currently at a Circ Desk (e.g. Tech Services Departments):

1. Conduct a Physical Titles search for the bib.
2. Click the Items link to go to the List of Items and filter as needed.
3. Use the checkboxes to select the items that need to move.
4. Choose Change Holdings in the upper right.
5. From the list of holdings presented, choose the appropriate holding and click Select.
6. The items are now attached to offsite storage holding and are marked as Item in place (at offsite storage).
7. To put the item at a Transit status, use Scan in Items > Done.
8. If you moved the last item on a holding, delete the holding.

Note: For batch processing large numbers of items, contact LTS for assistance. LTS can advise on how to set up the item update job and make sure that items are properly put into transit to Remote Storage.

Item Not In Hand - the Pick-list Method for Individual Item Records

To move items to offsite storage by putting them on a pick-list for Circ staff:

1. Make sure the holding record for the offsite storage location already exists.
2. Conduct a Physical Titles search for the bib (You can also search for that one item using a Physical Items search and skip step 3).
3. Click the Items link to go to the List of Items and filter as needed.
4. From the list of items, go to the row action item menu and select Change Location.
5. Choose:
   a. Request type: Move permanently
   b. To: (choose library)
   c. Destination locations: (choose offsite storage)
5. This will put it in a pick list for the Circ Desk. When they scan in the item, it will be moved to the new holding and marked as in transit.

What Happens Next?

After the item leaves your unit/library:

- The Offsite Storage location (HD/RD) accession the item
- A batch process sends all accessioned items to Alma.
- A batch process updates Alma to indicate the item has been received at Offsite Storage.