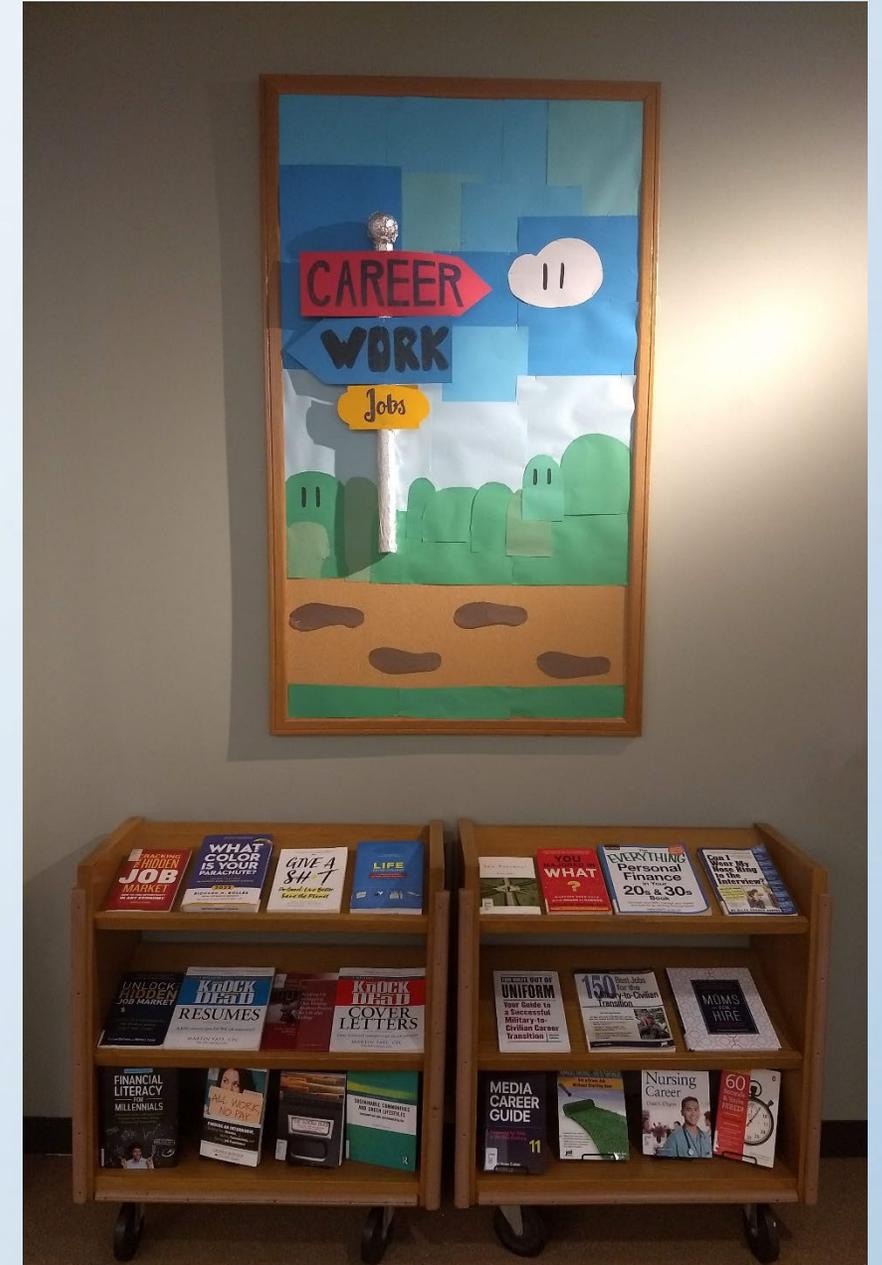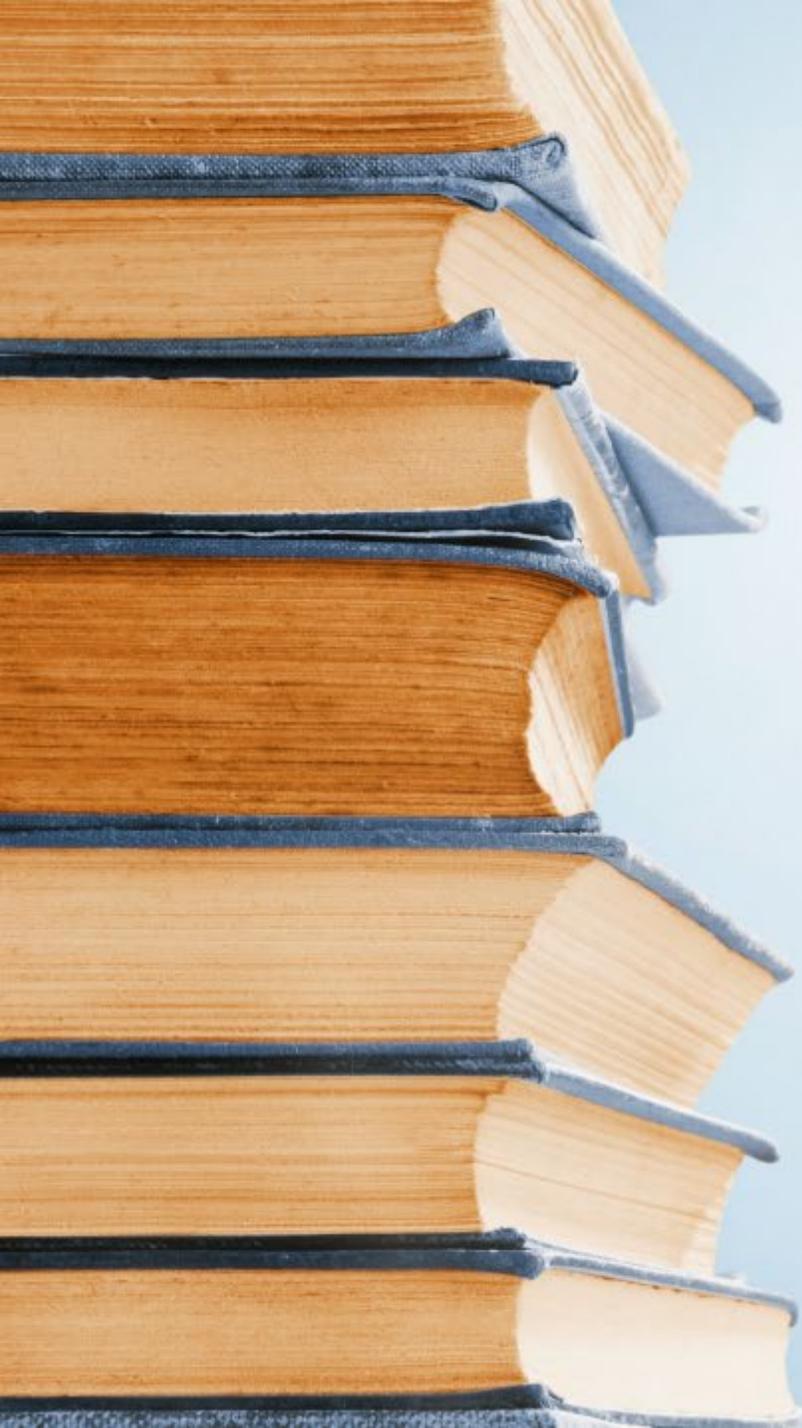# Display Preparation with Circulation Work Orders

Gretchen Schneider
Coordinator of Access Services
Oakton Community College Library

Today I will show you:

- How to create a circulation work order area to store items as you prepare a display

- How to create sets of items used for common displays to reuse annually

- How to run a job to send a set to the pick from shelf for display preparation
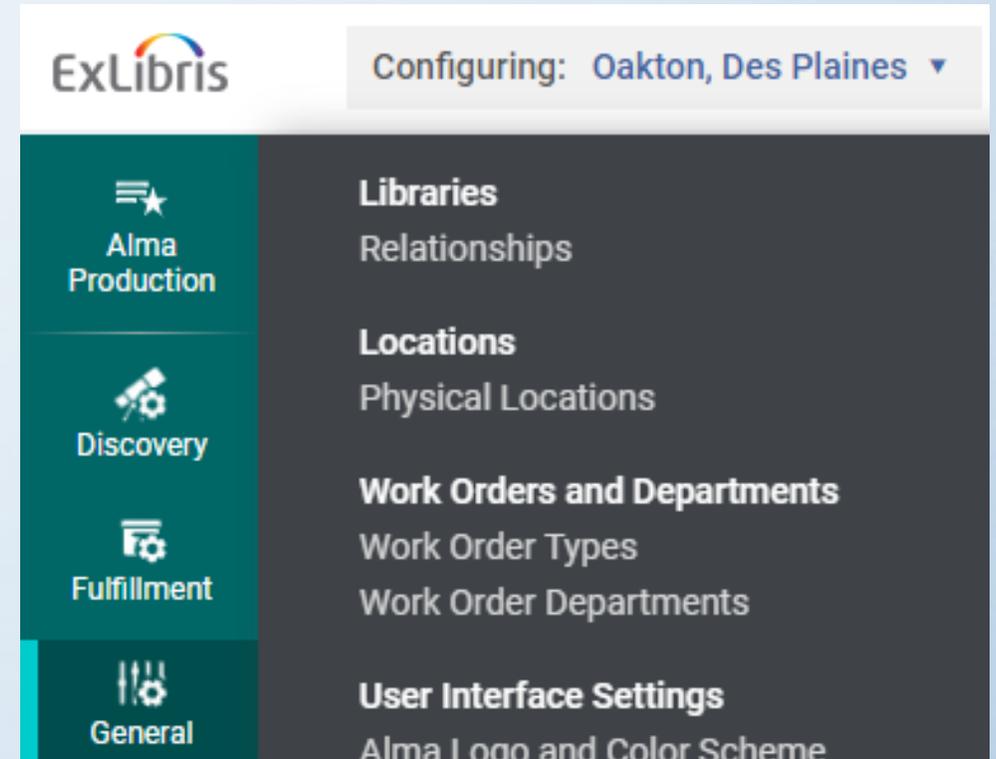
Create a Display Preparation Area
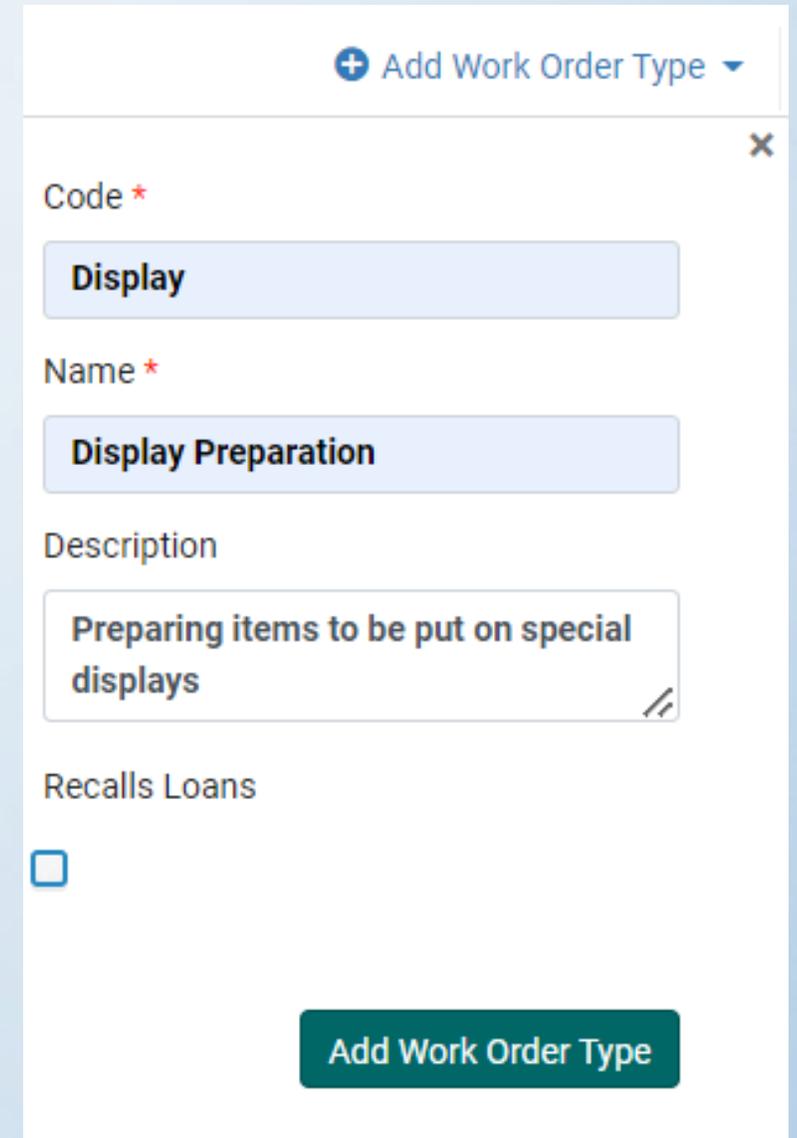
Role: General System Administrator

Configuring: Pick library location
(if necessary)

Location: Configuration > General
> Work Orders and Departments >
Work Order Types

Add Work Order Type

- Click Add Work Order Type

- Fill in the following:
  - Code
  - Name
  - Description

- Deselect Recall Loans (optional)
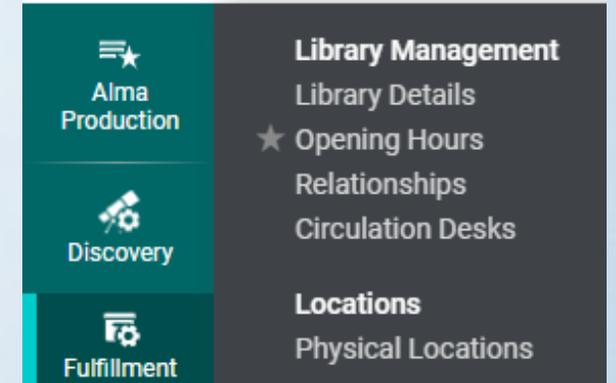
- Click Add Work Order Type Button

Adding the Circulation Desk

Roles: General System Administrator or Fulfillment Administrator

Location: Configuration > Fulfillment > Library Management > Circulation Desks

- On the Circulation Desks List, click … next to your circulation desk

- Click Edit

	⬍ Code	▲ Name	Description	Primary	Supports Digitization	
1	DEFAULT_CIRC_DESK	DP Circulation Desk	-	✓		···
2	DP_LEARN	DP Learning Center	-			
3	DP_MEDIA	DP Media Services	-			

Edit
Duplicate
Delete

Add Circulation Work Order Type

- Click the Work Order Types Tab

- Click Add work order

- Select the created Work order type from the dropdown menu

- Enter the Work order time (days)

- Click Add work order

- Click Save on the top right
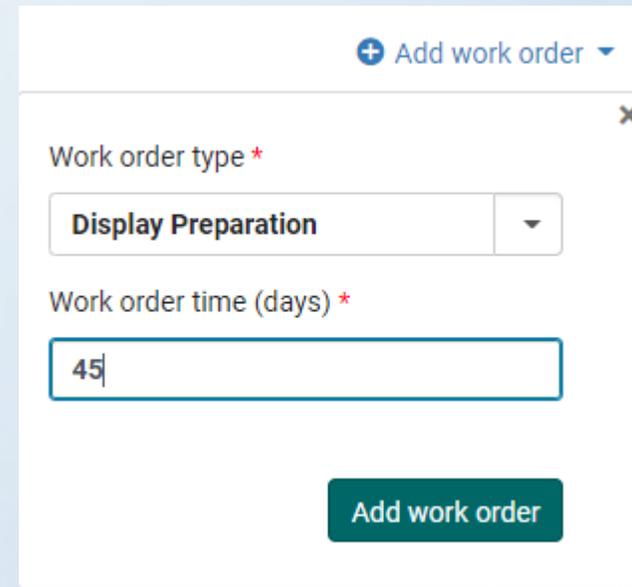
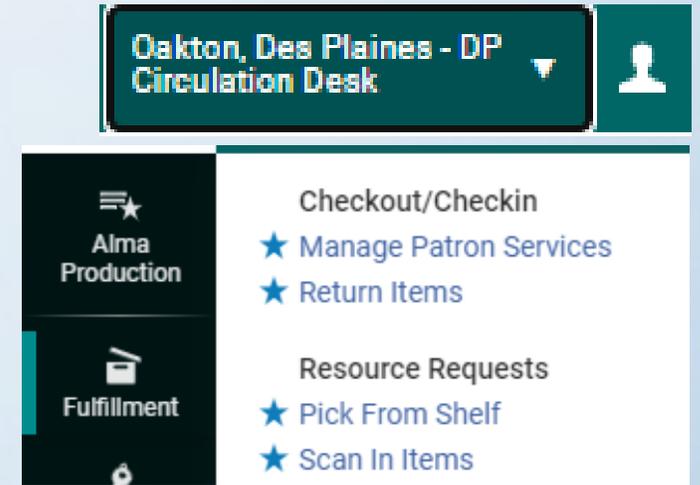# Display Preparation Work Order Area: Adding & Removing Items

Manually Adding Items to the Work Order Department

Role: Physical Inventory Operator or Physical Inventory Operator – Extended

Desk Location: Circulation Desk

Location: Fulfillment > Resource Requests > Scan In Items

- Select
  Work Order Type

- Scan item barcode

Oakton, Des Plaines - DP
Circulation Desk

Alma Production

Checkout/Checkin
★ Manage Patron Services
★ Return Items

Fulfillment

Resource Requests
★ Pick From Shelf
★ Scan In Items

Scan in Items	Change Item Information

| Automatically print slip	● Yes ○ No
Work Order Type	**Display Preparation** ▾
Set Status To	▾
Done	○ Yes ● No
Scan item barcode *	🔍 Look-up or select ☰ OK

Remove Items from the Work Order Department

Role: Physical Inventory Operator or Physical Inventory Operator – Extended

Location: Fulfillment > Resource Requests > Manage In Process Items

- Select Work Order Type

- Toggle & click Done

Work Order Type *	Display Preparation						
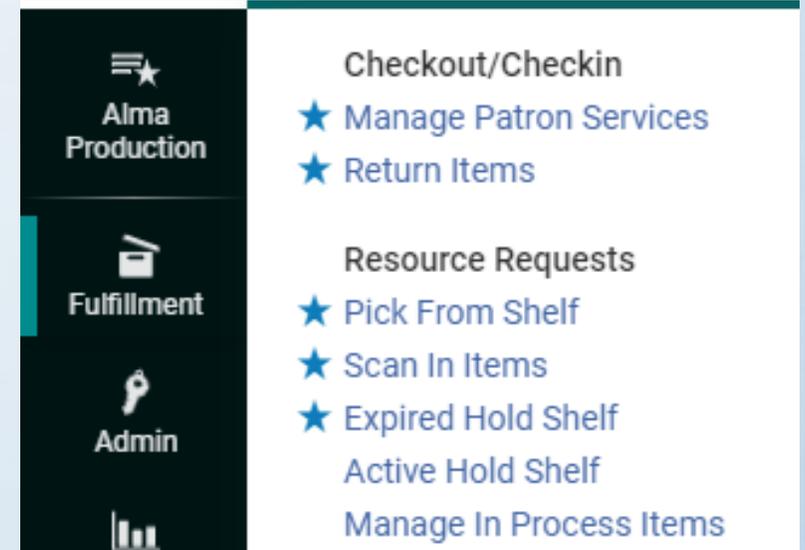
Process Status : All	Request Filter : All	Library : All					
	⇅ Status	Call Number	▲ Title	Barcode	Date received ⇅ for department	End of ⇅ Activity	Notes	Library
1	☐ -	RHC. TR267.5.I57 F75 2020	No filter : the inside story of Instagram / Sarah Frier.	33211001956444	11/10/2022	12/25/2022		Oakton, Des Plaines

1 - 1 of 1 Title ▼ [ ] 🔍   0 rows selected   Generate Barcode   Done
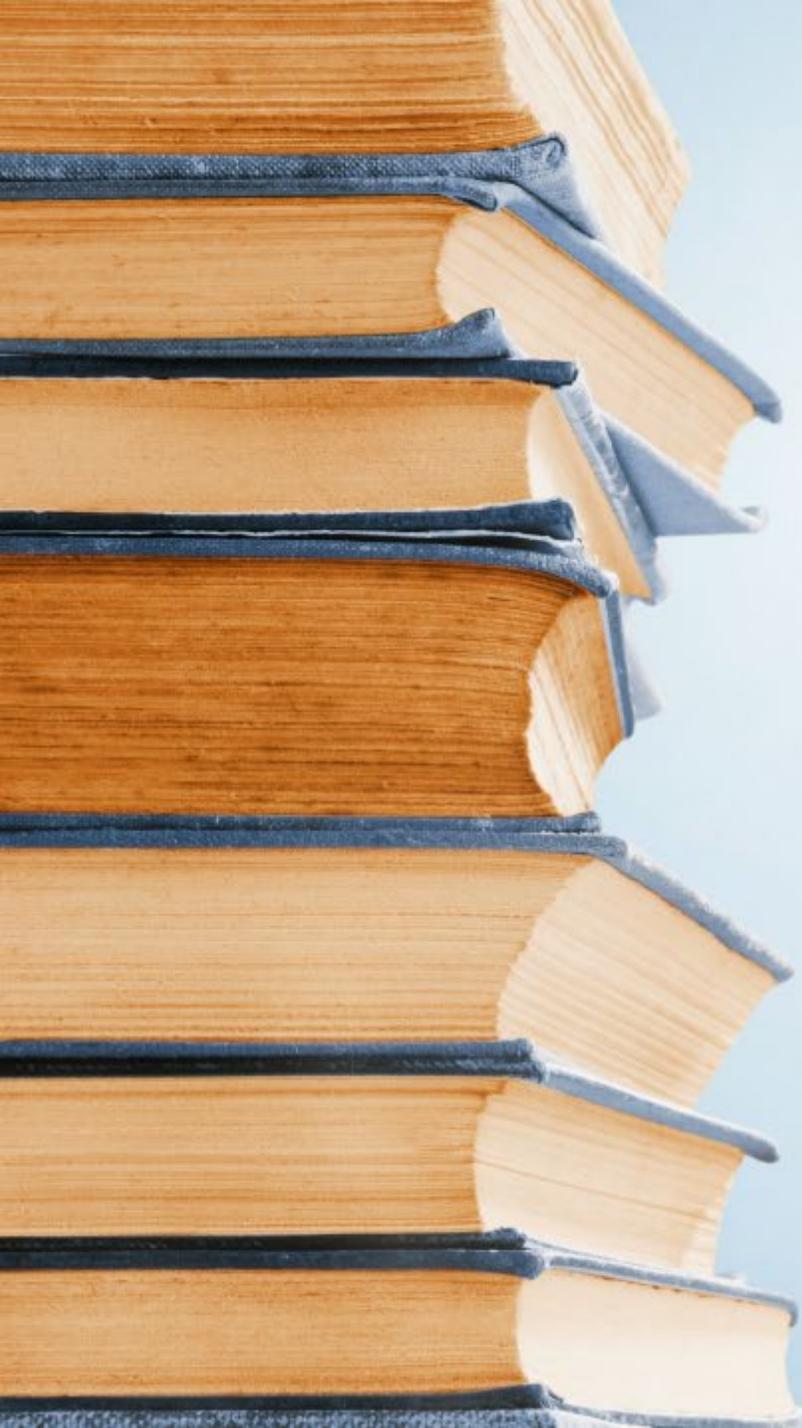
Creating a Display Itemized Set

Creating a Set List

Create a list of books you want to keep as an itemized set:

- Create a Notepad document

- Type "Barcode" on the first line
  (first letter alphabetized)

- Starting with the second line, scan in the item barcodes of the items you wish to add to the set
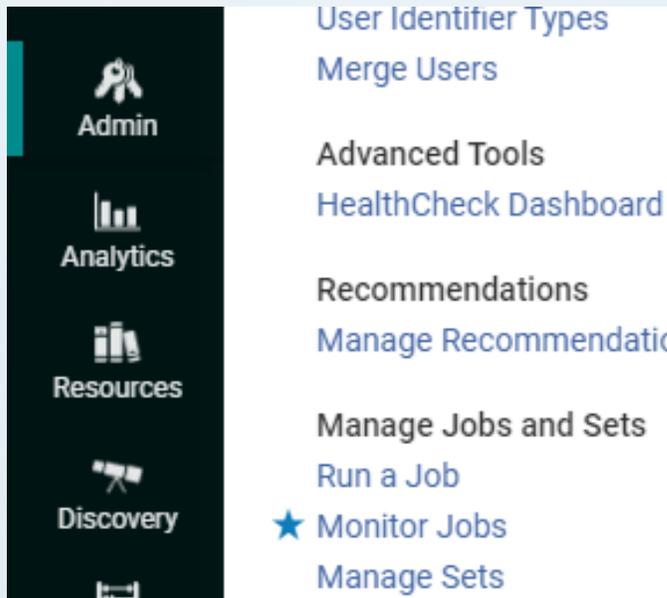
- Save the notepad document
  File > Save
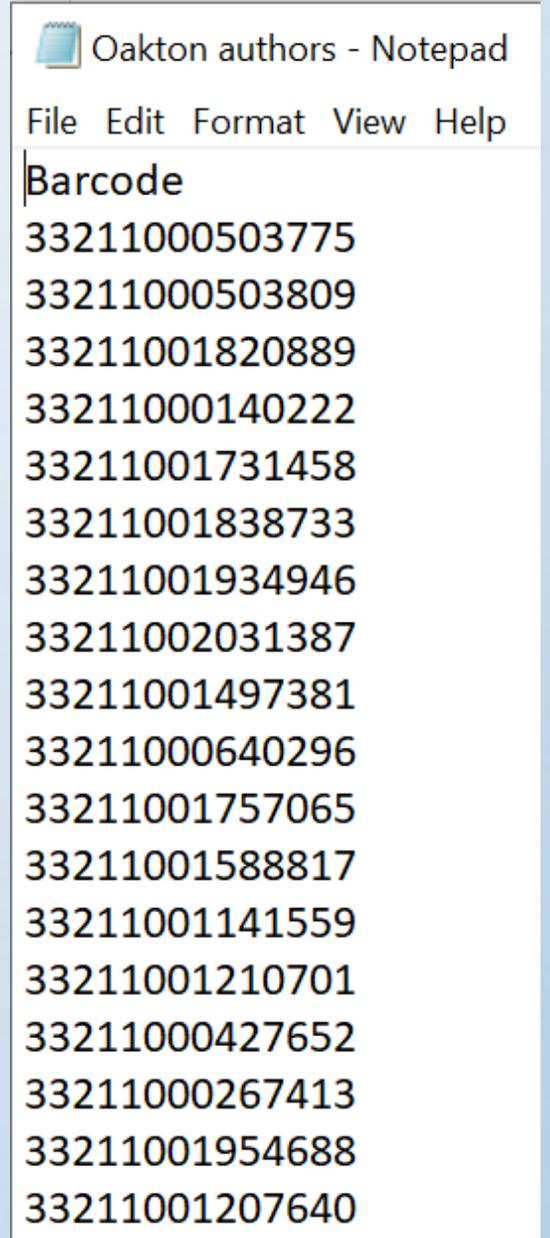
Oakton authors - Notepad

File   Edit   Format   View   Help

Barcode
33211000503775
33211000503809
33211001820889
33211000140222
33211001731458
33211001838733
33211001934946
33211002031387
33211001497381
33211000640296
33211001757065
33211001588817
33211001141559
33211001210701
33211000427652
33211000267413
33211001954688
33211001207640

Creating a Display Itemized Set

Role: Fulfillment Services Operator or Fulfillment Services Manager

**Location**: Admin > Manage Jobs and Sets > Manage Sets

User Identifier Types
Merge Users

Advanced Tools
HealthCheck Dashboard

Recommendations
Manage Recommendatic

Manage Jobs and Sets
Run a Job
★ Monitor Jobs
Manage Sets

Admin

Analytics

Resources

Discovery

Manage Sets ? GuideMe

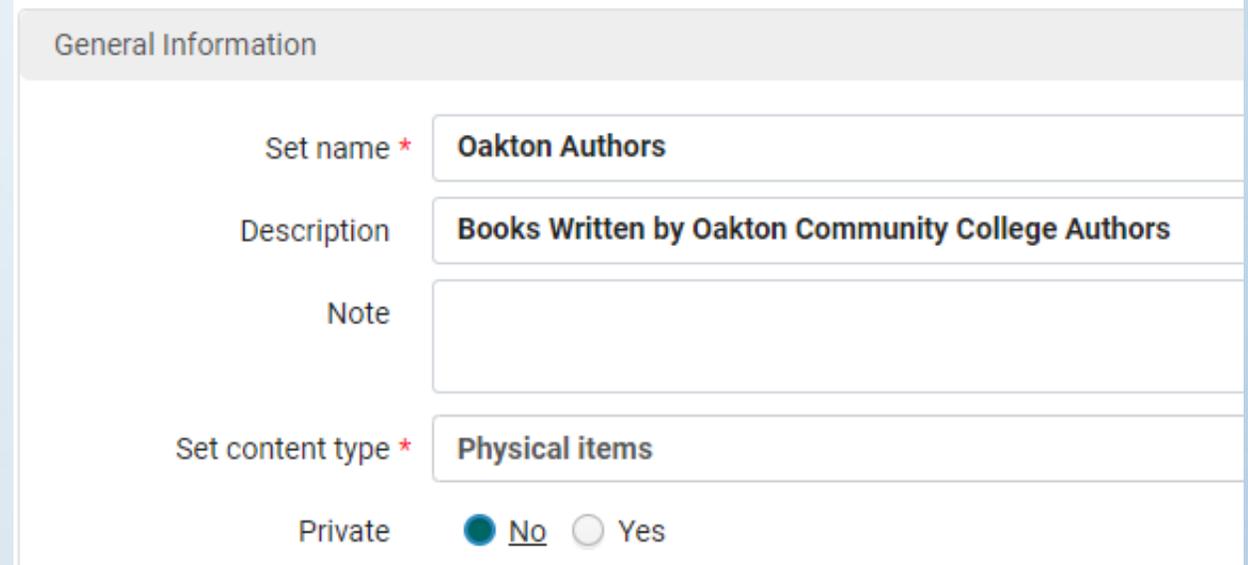|	Active	Name	Type
6	⬤	DP Banned Books Week	Itemized
7	⬤	Fall Textbook display DP	Itemized
8	⬤	Summer Reading	Itemized
9	⬤	DP Fourth of July	Itemized
1...	⬤	DP Summer Sports	Itemized
1...	⬤	DP Pride month	Itemized
1...	⬤	DP Post-graduation Pathways	Itemized
1...	⬤	AAPI Heritage Month	Itemized

Adding an Itemized Set

On the Manage Sets page, click Add Set and choose Itemized
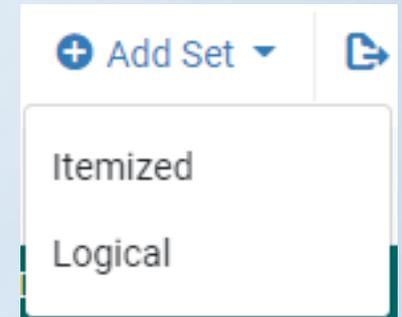
Enter General Information:

- Set name

- Description

- Set content type:
  Select Physical Items

- Private: Yes/No
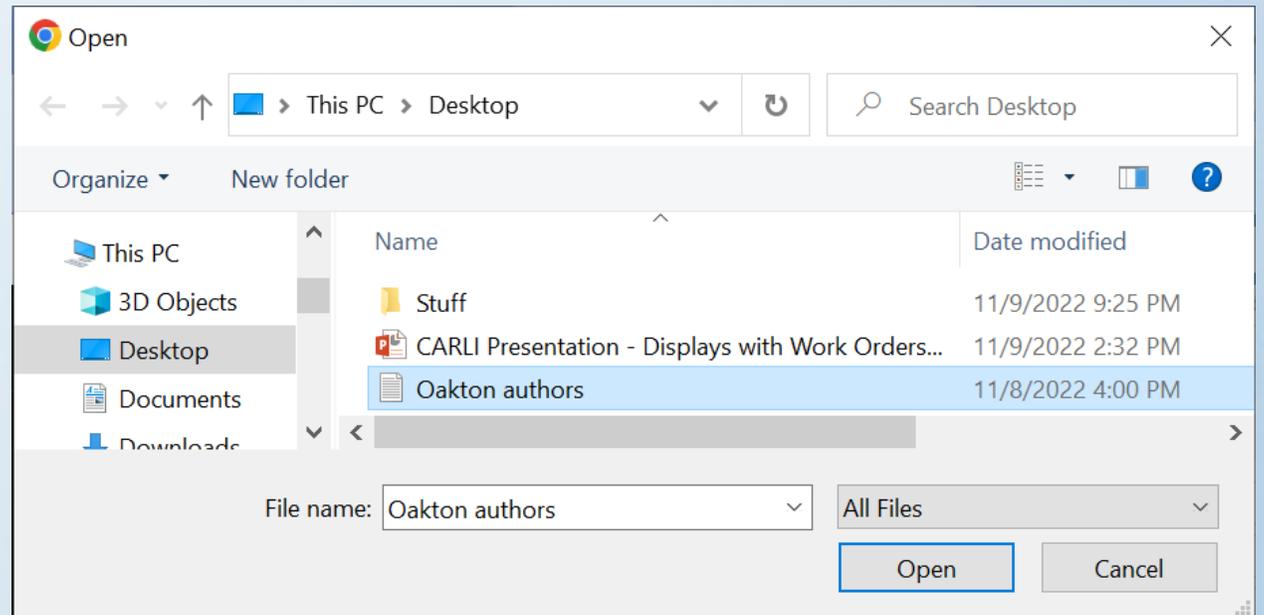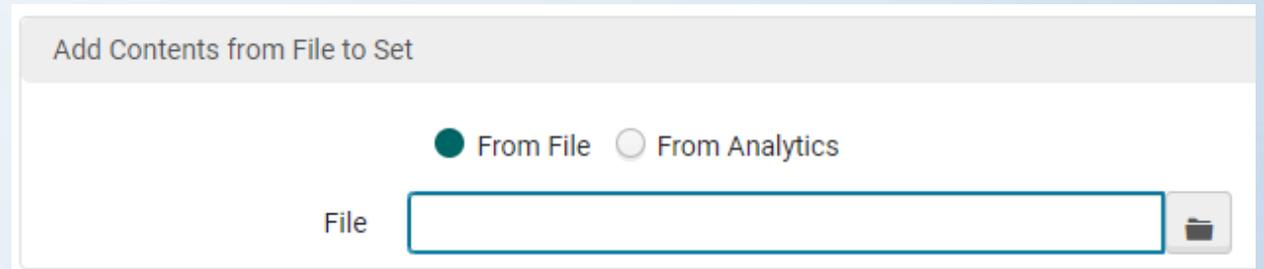
Adding an Itemized Set (continued)

Add Contents from File to Set:

- Click the File icon

- Select Set File

- Click Open

- Click Save
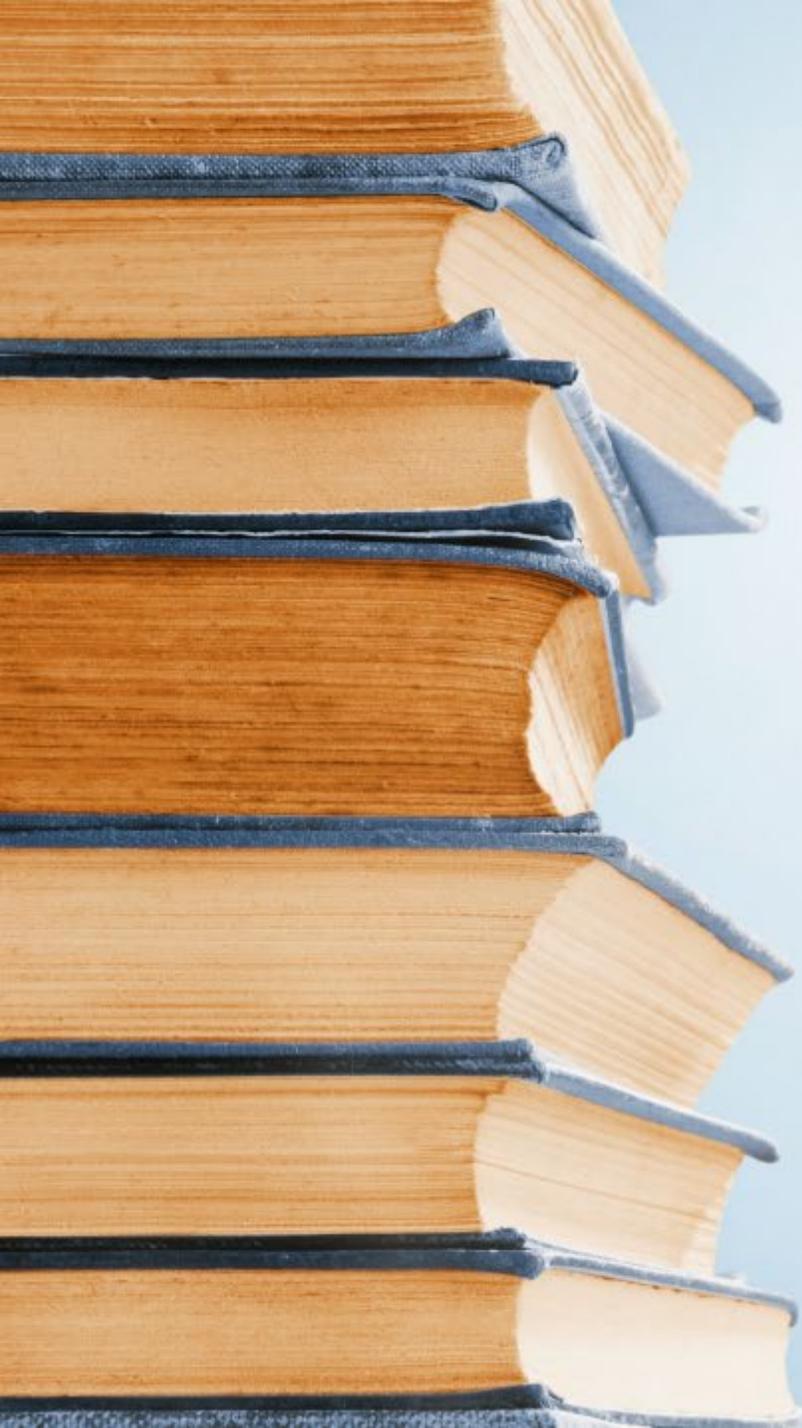
Sending Sets to Pick from Shelf

Send to Pick From Shelf

Role: Fulfillment Administrator
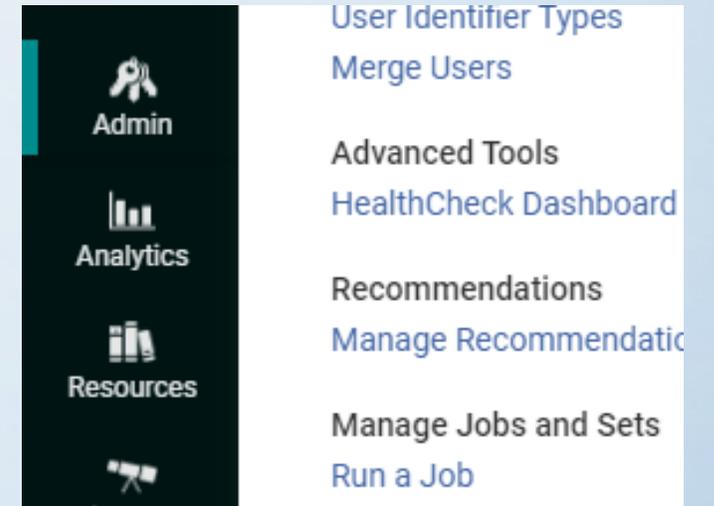
Location: Admin > Manage Jobs and Sets >
Run a Job

Job Name: Create physical item work orders

| Create physical item work orders | This task chain creates work order requests on the physical items. | Physical item | Request |

Run a Job, page 1

- Search for Description: work order

- Select Job

- Click Next

Run a Job - Select Job to Run [? GuideMe]   (1)—(?) Cancel Next

1 - 1 of 1 | Description ▾ | work order | 🔍 | ▶ ⚙

▼ Type : All ▾   Source type : All ▾   Content type : All ▾

▲ Name	◆ Description	Content Type	◆ Type
1. ● Create physical item **work** orders	This task chain creates **work order** requests on the physical items.	Physical item	Request

Run a Job, page 2

- Select the Itemized List

- Click Next

Run a Job, page 3

- Select the Work Order Type: Display Preparation (this will auto select the department to match)

- Leave "Do not pick from shelf" unchecked

- Click Next

Run a Job, page 4

- Review

- Click Submit

Run a Job - Review and Confirm ① ② ③ ④ Cancel Back **Submit**

General Information ⌄

Job Name **Create physical item work orders - Oakton Authors - 11/09/2022 9:54 PM**

Set Information ⌄

Set ID **1270692240005873**

Name **Oakton Authors**

Set Size **22**

Task Parameters: Create Work Order Requests ⌄

Work Order Type **Display Preparation**   Department **DP Circulation Desk**

Do not pick from shelf **false**
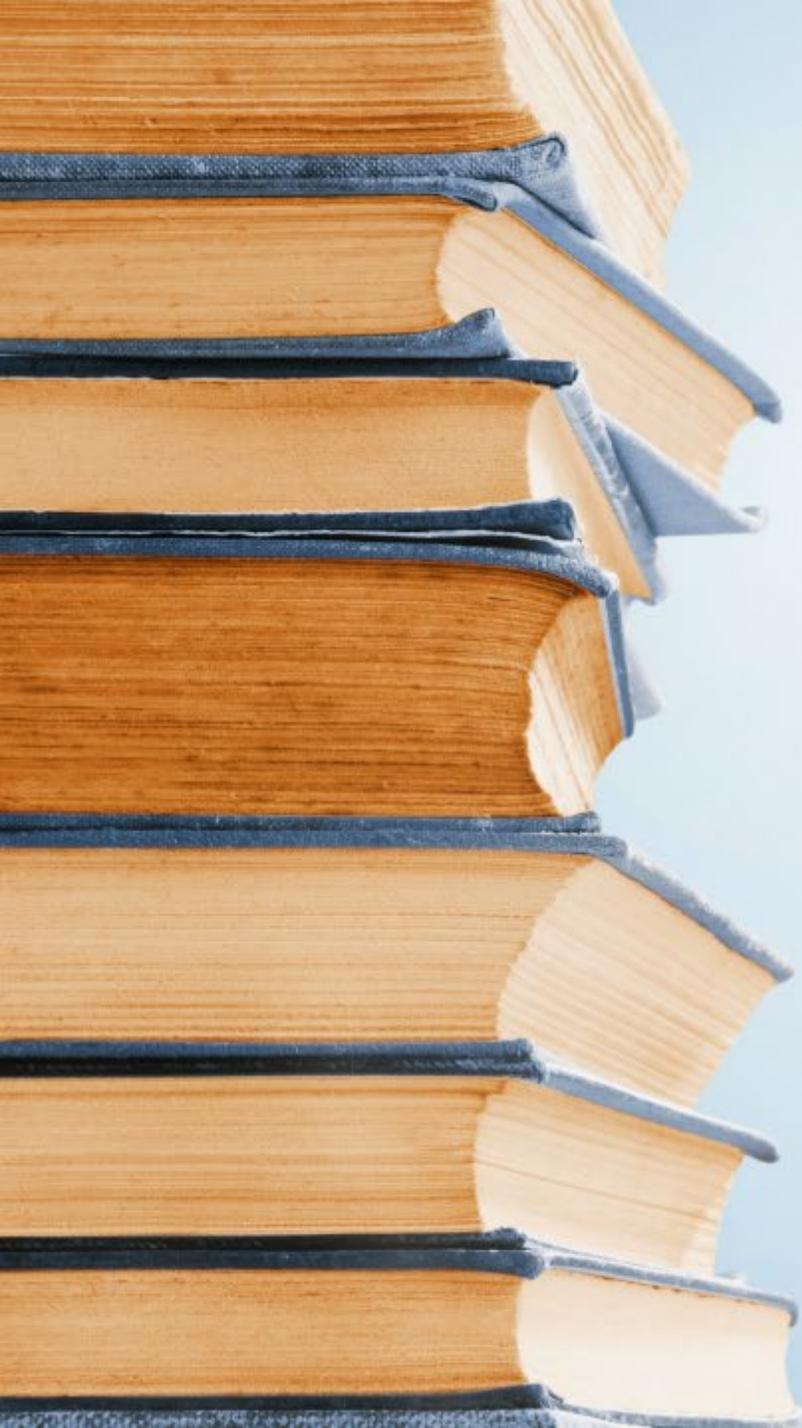
Display Preparation Work Order Area: Adding Requested Items

Find Books

Role: Requests Operator

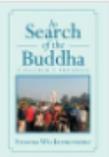**Location**: Fulfillment > Resource Requests > Pick From Shelf

- Find Books

Resource Requests
★ Pick From Shelf
Fulfillment

Pick Up Requested Resources (1 - 20 of 22)

Print Slip Report

☐ Select All   Sort by : **Call Number - Asc** ▼   Print Slip   Cancel

1 ☐   In search of the Buddha : a pilgrim's progress / Swarna Wickremeratne ; foreword by Prof. George D. Bond, Northwestern University, Evanston, Illinois.
Author: Wickremeratne, Swarna, 1939- author.
ISBN: 1493114352
Imprint: [Bloomington, Ind.?] : XLibris LLC, [2013]

Location: DPL Stacks
Call Number: BQ6450.I4 W53 2013
Requests: 1

Cancel Request   Mark as Missing   ...

Scan Books

Role: Requests Operator

Location: Fulfillment > Resource Requests > Scan In Items

- Scan item barcode
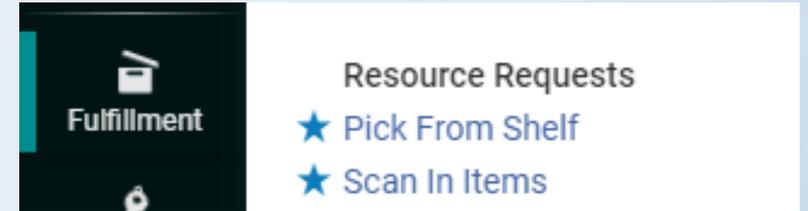
Final Result

Items scanned will be added to the Display Preparation area

Title	Destination	Barcode	Request/Process Type
1.. In search of the Buddha : a pilgrim's progress / Swarna Wickremeratne ; foreword by Prof. George D. Bond, Northwestern University, Evanston, Illinois.	Manage Locally (Display Preparation)	33211001934946	Display Preparation

Questions?
Contact me at gschneid@oakton.edu