

# Placing Work Orders

Documentation by Kyle McCafferty, University of Illinois – Urbana-Champaign

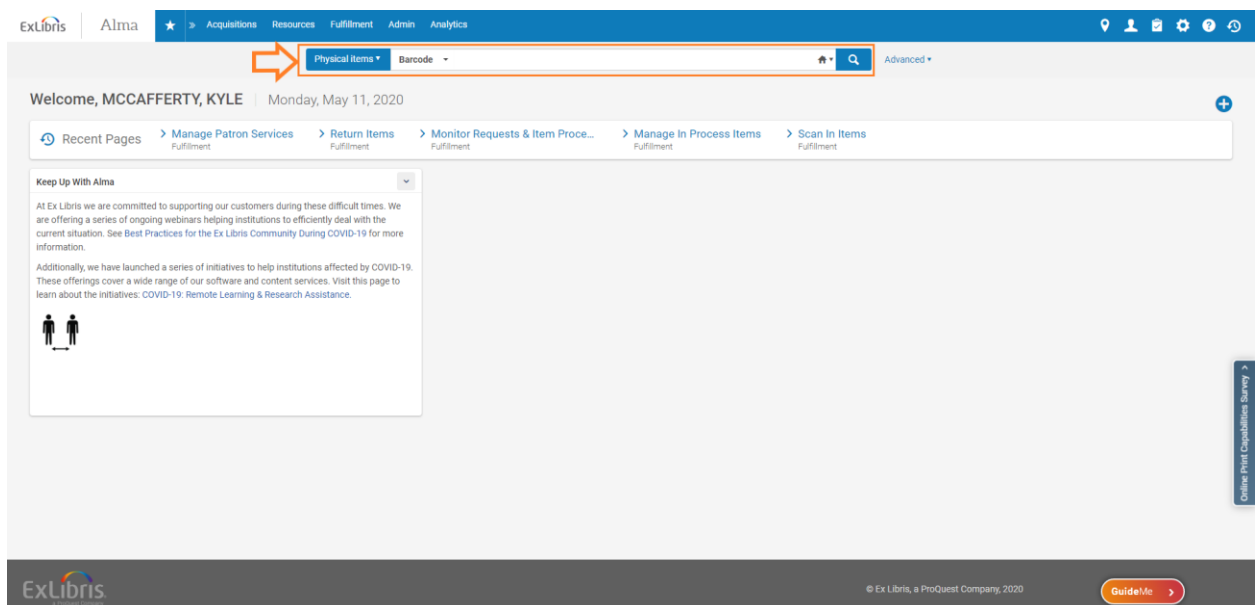
A work order is an internal staff driven request. Create a work order when an item needs attention. For example, a damaged book that needs to be sent to Preservation, or cataloging maintenance that needs to be sent to ACS for a correction. There are a few ways to create a work order in Alma, and here we list three that may be useful while working in Alma.

## FOUND ITEM

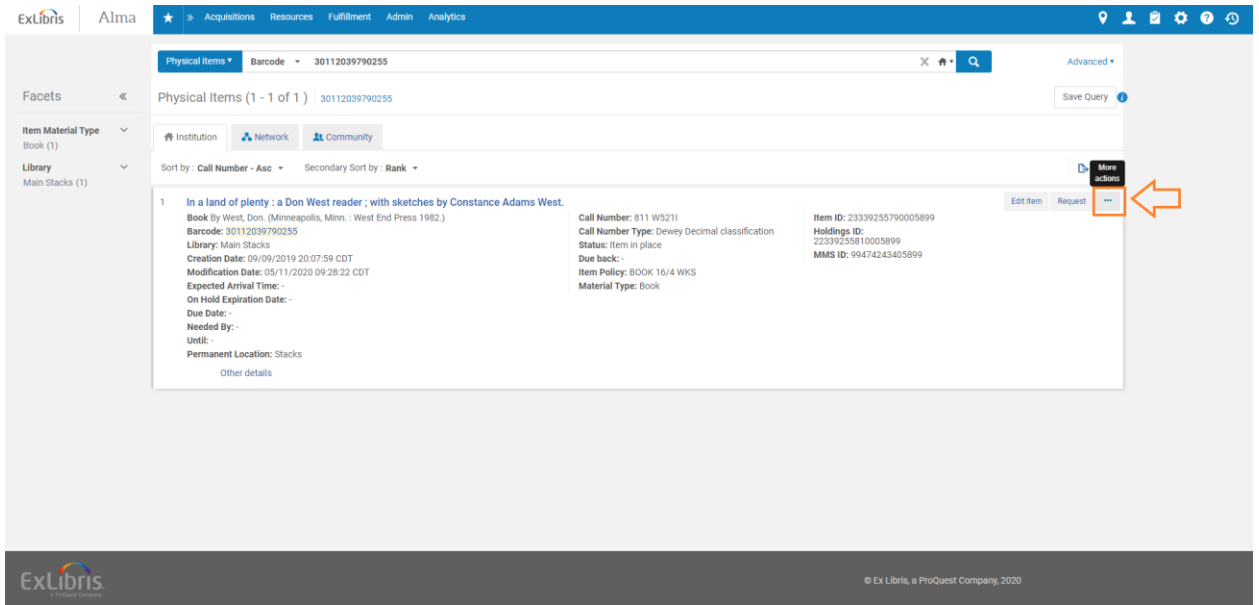
Follow these steps if you find an item that needs to be routed to a work department and you are not checking the item in or out. There is a different path to selecting a work order depending on which parameter is set. This will go through "Physical Items" and "Physical Titles" as the first search parameter.

Found Item, "Physical Items" parameter:

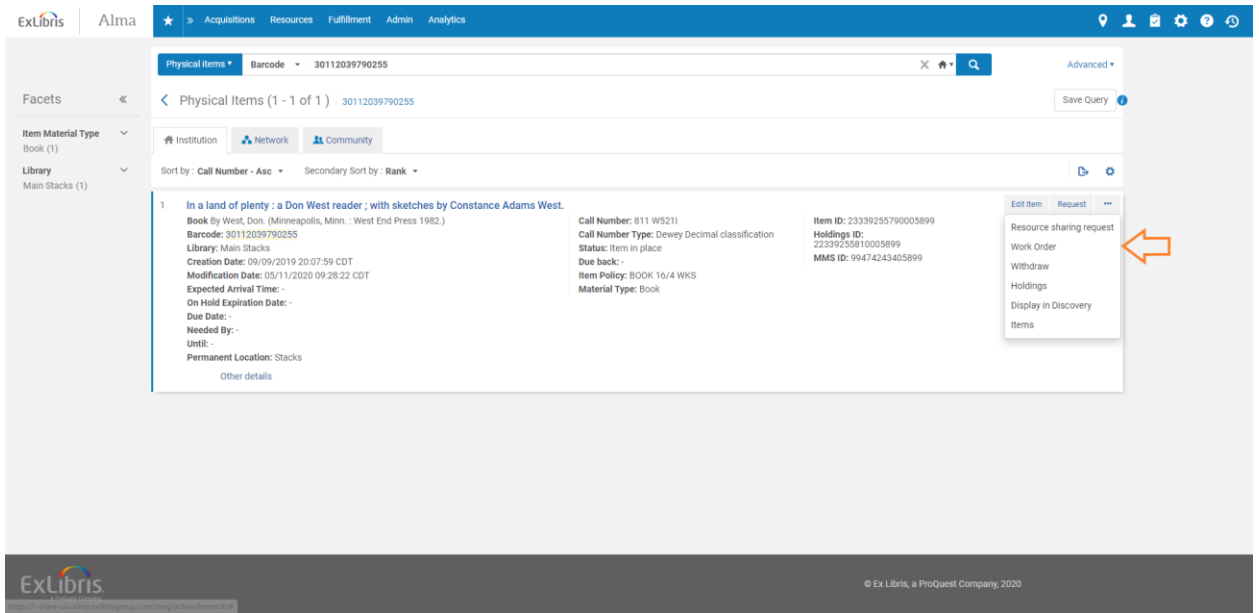
1. On the main Alma screen, set the first search parameter to "Physical Items". The other parameters may be set as appropriate for finding the item's record.



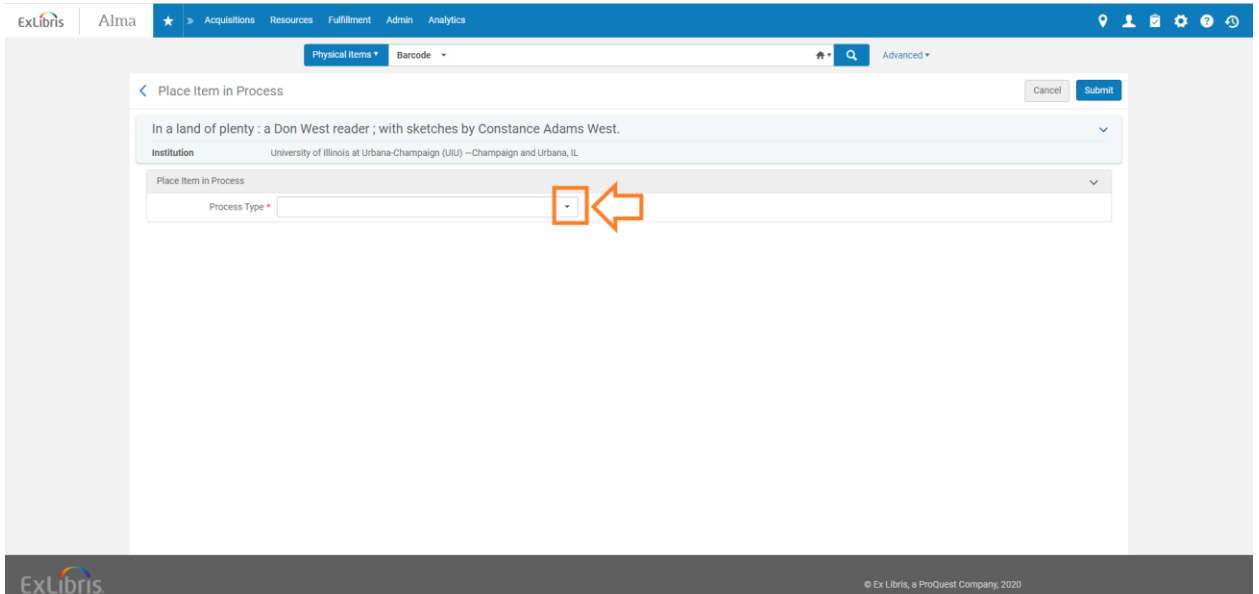
2. Locate the item's record, then click on the ellipsis on the right side to bring up the "More actions" menu.



### 3. Select "Work Order".



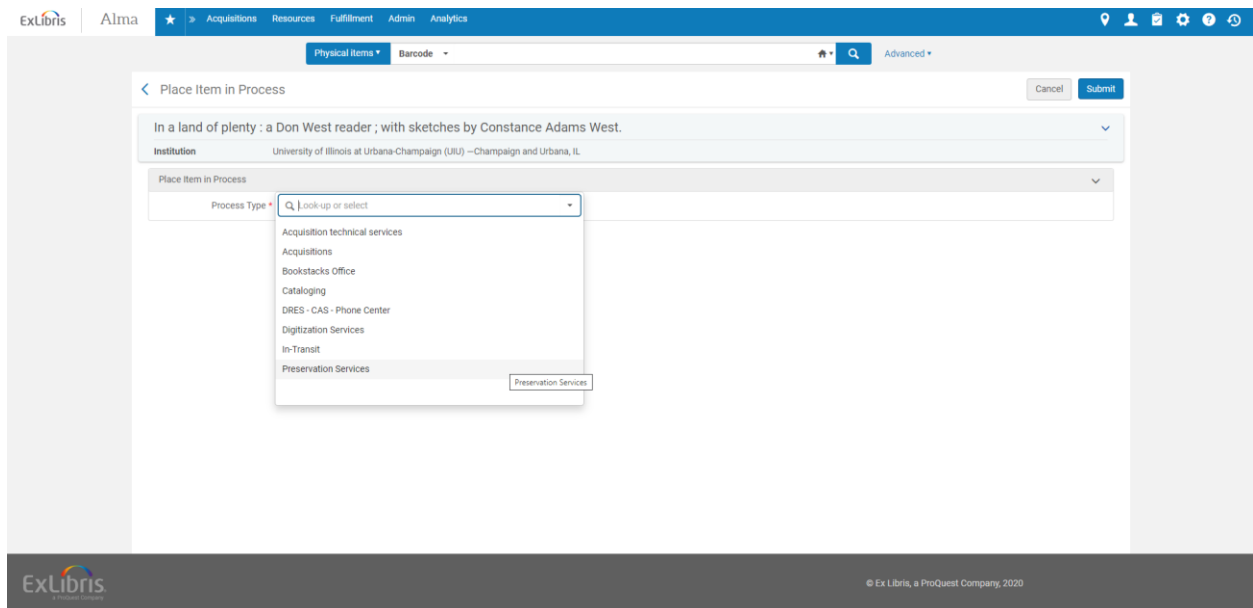
4. The Place Item in Process screen will open. In the "Process Type" field, click on the down arrow to open the drop down menu.



5. Select the department to which you want to route the item. If you are choosing Digitization Services because a patron would like the item digitized, please make sure to include the following information in the Notes field:

- Patron First/Last name
- Patron @illinois.edu email address

This will ensure DS knows which patron to contact.



6. If the item is in hand and not on the shelf, check the "Do not pick from shelf" box. Make a brief note of what action is to be taken in the "Note" field. Select the Managing Department from the drop down menu. At this point in time, the name of the Managing Department is almost always the same as the Process Type, and you will not be able to select a managing department that differs in name from the process type.

ExLibris | Alma

★ > Acquisitions Resources Fulfillment Admin Analytics

Physical Items Barcode

Place Item in Process

In a land of plenty : a Don West reader ; with sketches by Constance Adams West.

Institution University of Illinois at Urbana-Champaign (UIU) - Champaign and Urbana, IL

Place Item in Process

Process Type \* Preservation Services

Do not pick from shelf

Note Spine broken

Managing Department \* Preservation Services

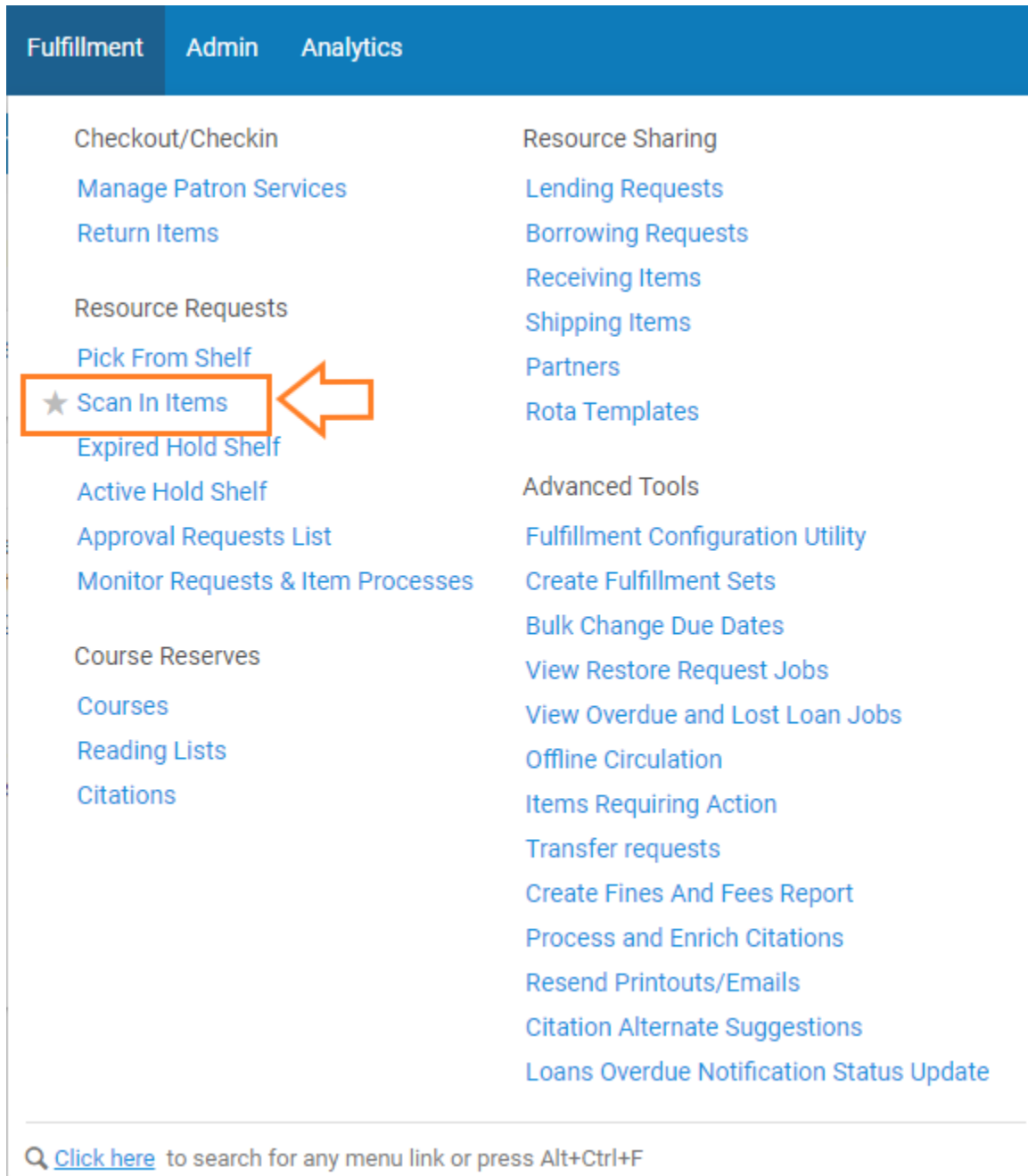
Cancel Submit

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7. Click the "Submit" button and send the item to the appropriate work department.

Cancel Submit

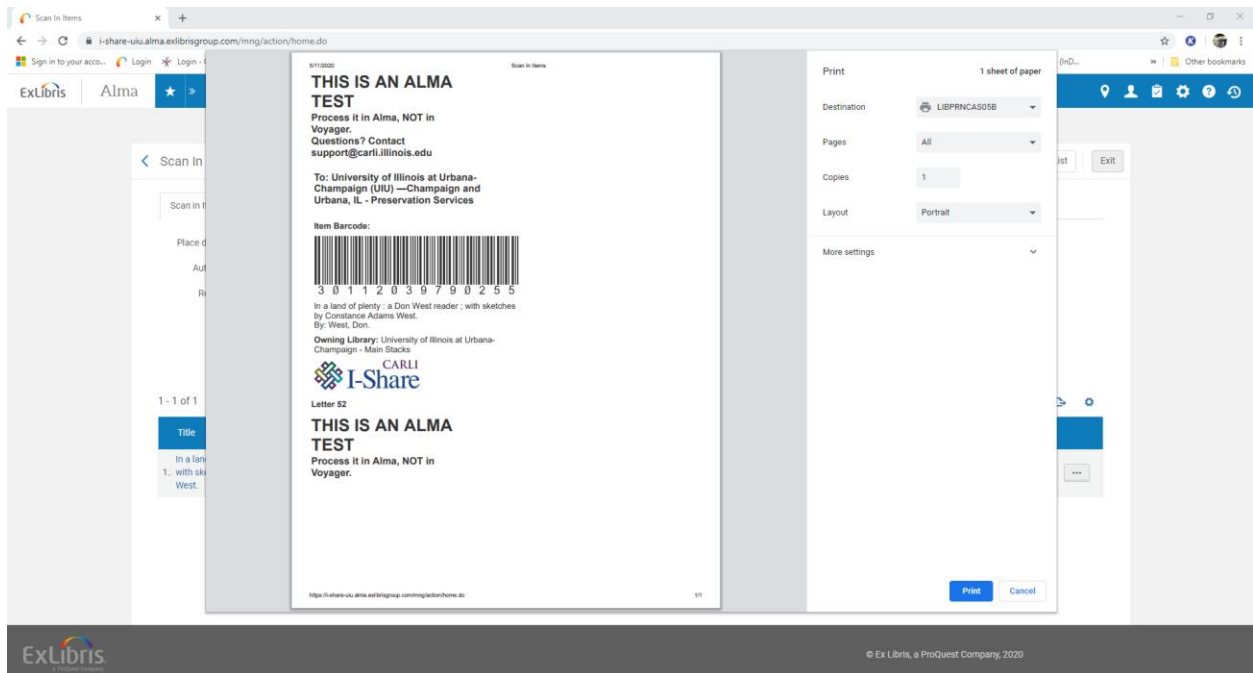
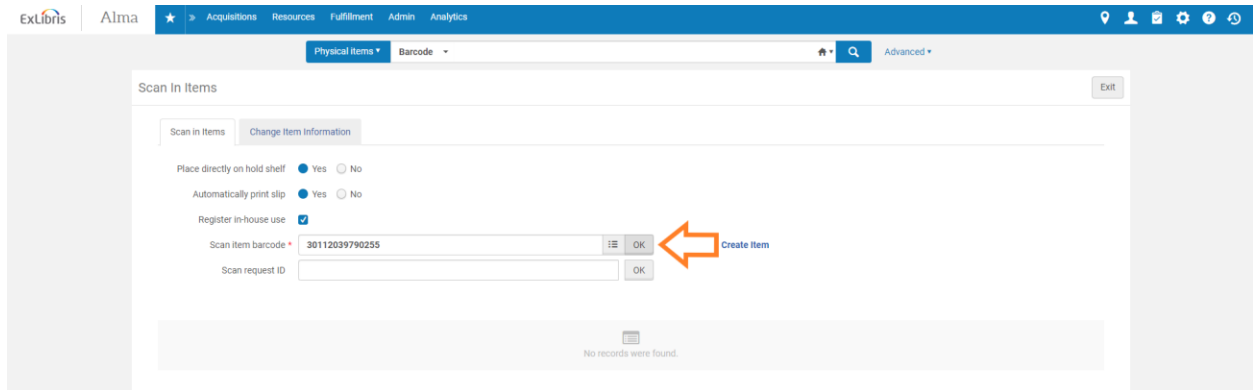
8. Navigate to the "Scan in Items" screen. Scan in the item, and a routing streamer will print, and you will be able to send it to the appropriate work order department.



The screenshot shows a navigation menu with three main sections: Fulfillment, Admin, and Analytics. The 'Scan In Items' option is highlighted with a red box and a red arrow pointing to it from the right. Below the menu is a search bar with a magnifying glass icon and the text 'Click here to search for any menu link or press Alt+Ctrl+F'.

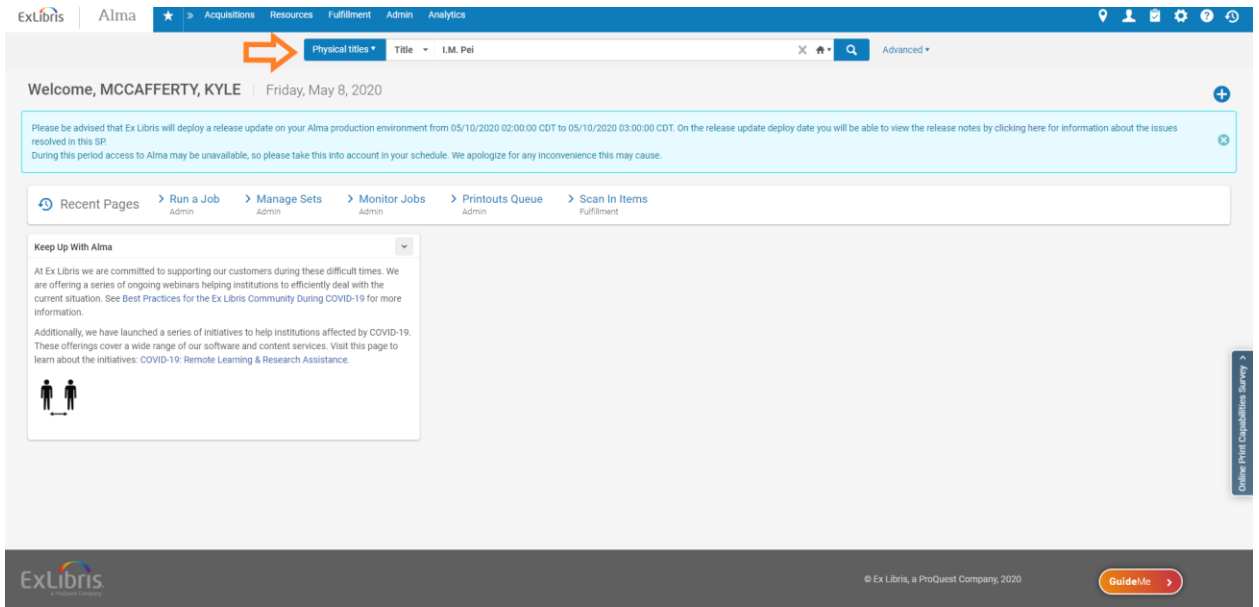
Fulfillment	Admin	Analytics
Checkout/Checkin		Resource Sharing
Manage Patron Services		Lending Requests
Return Items		Borrowing Requests
		Receiving Items
Resource Requests		Shipping Items
Pick From Shelf		Partners
★ Scan In Items		Rota Templates
Expired Hold Shelf		
Active Hold Shelf		Advanced Tools
Approval Requests List		Fulfillment Configuration Utility
Monitor Requests & Item Processes		Create Fulfillment Sets
		Bulk Change Due Dates
Course Reserves		View Restore Request Jobs
Courses		View Overdue and Lost Loan Jobs
Reading Lists		Offline Circulation
Citations		Items Requiring Action
		Transfer requests
		Create Fines And Fees Report
		Process and Enrich Citations
		Resend Printouts/Emails
		Citation Alternate Suggestions
		Loans Overdue Notification Status Update

🔍 [Click here](#) to search for any menu link or press Alt+Ctrl+F

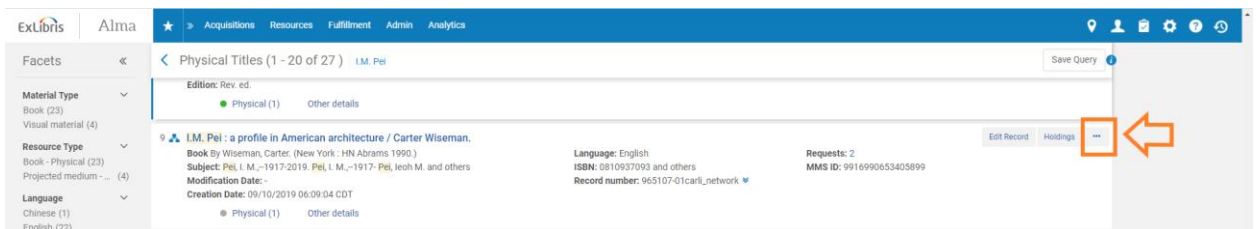


Found Item, "Physical Titles" parameter:

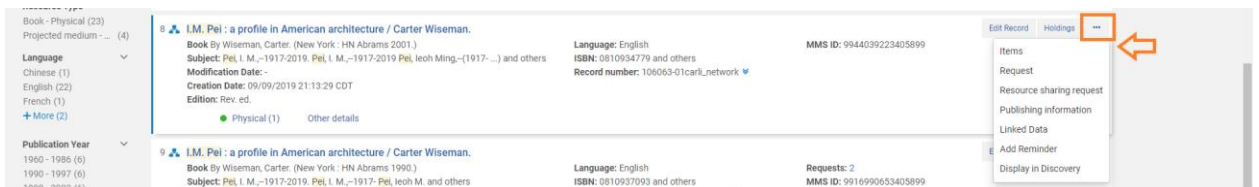
1. On the main Alma screen, set the first search parameter to "Physical Titles".



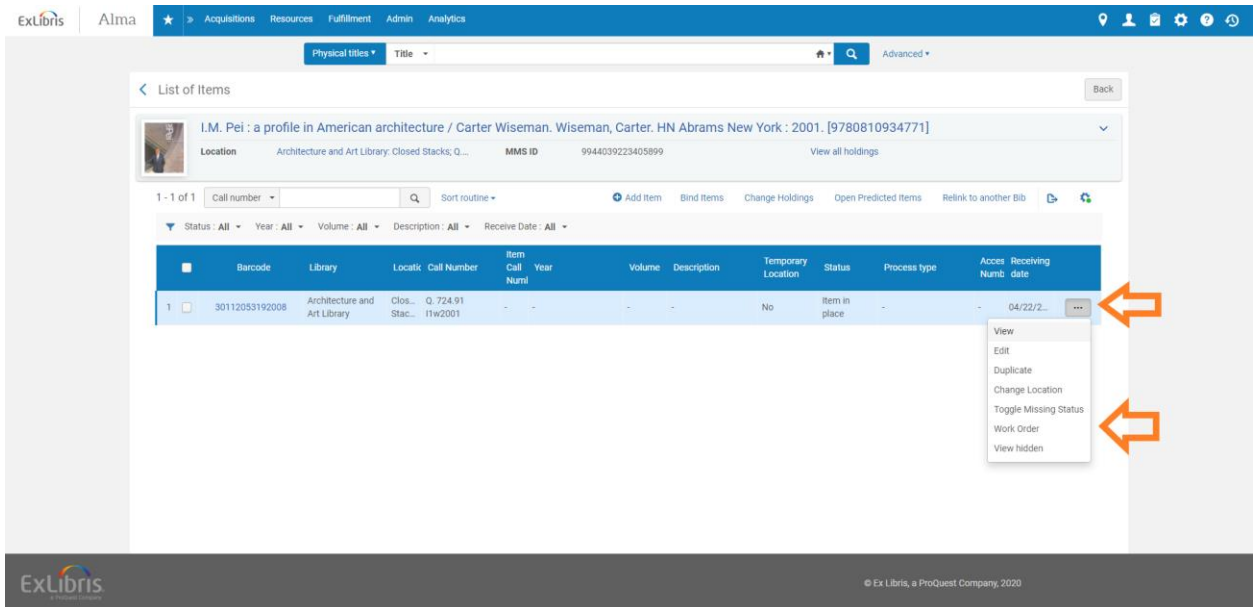
2. Locate the item's record, then click on the ellipsis on the right side to bring up the "More actions" menu.



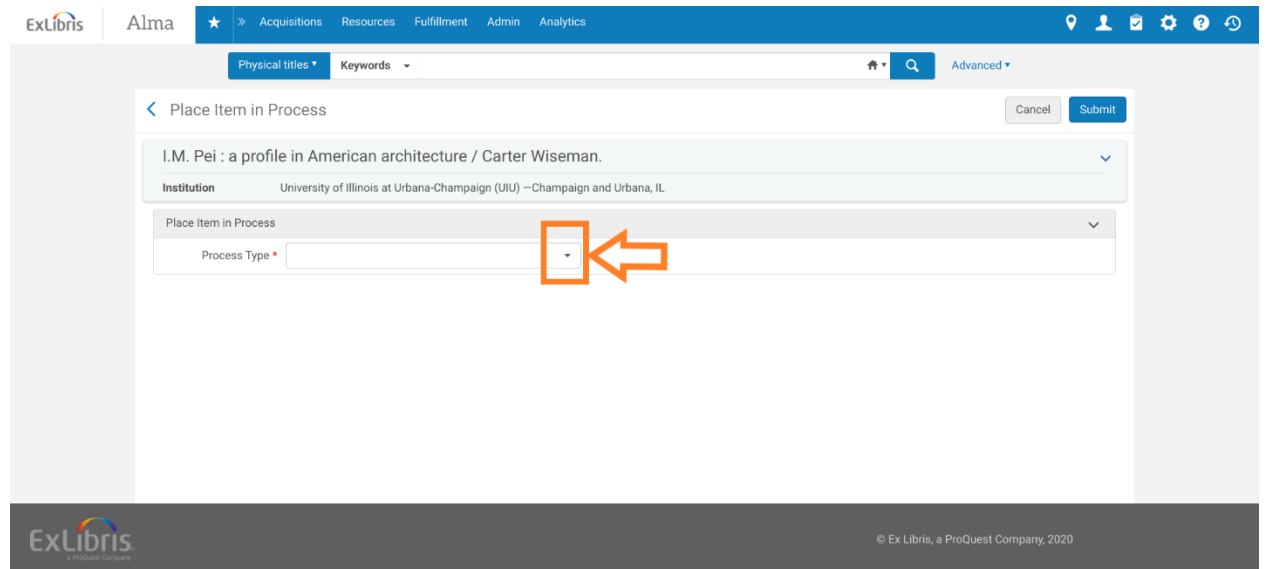
3. Select "Items".



4. Under the Receiving Date column, next to the receiving date, click the ellipses, and then select work order.

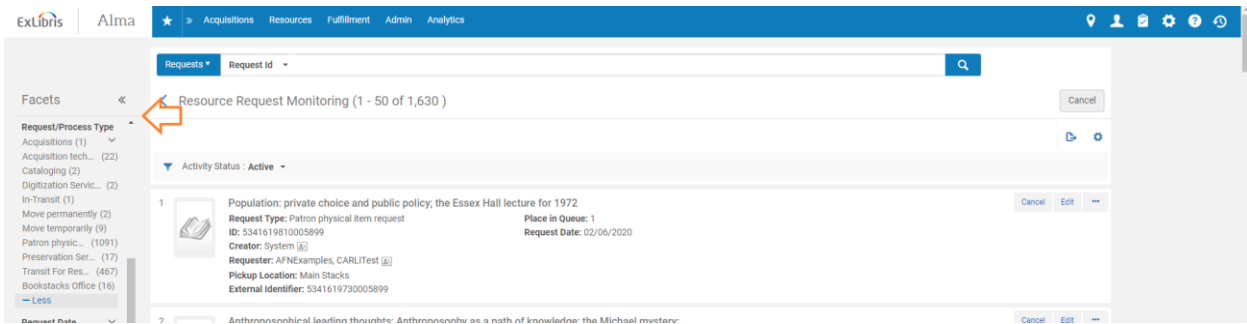


5. The Place Item in Process screen will open. Proceed as outlined in steps 4 - 7 in the above section.

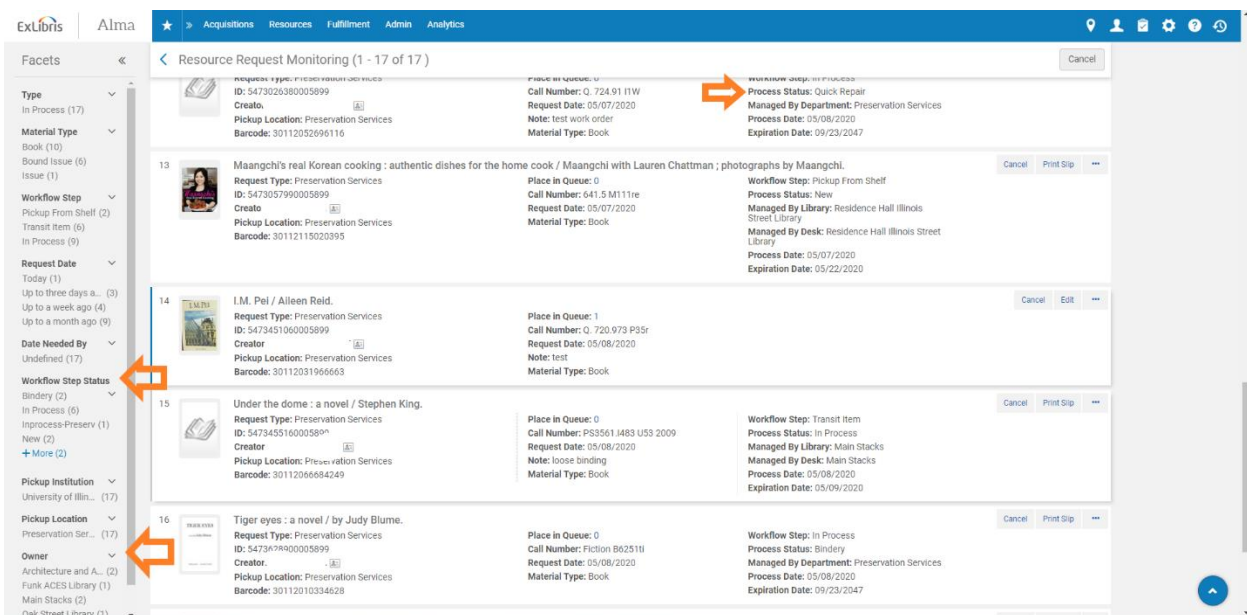


Note: To see the status of a work order, please see the Monitoring Local Item Requests Documentation. You can view your work order in the "Request/Process Type" facet.





Once the request type is selected, you can see the statuses of your department's items. Some potentially helpful filters are owning library, and workflow step status at the point:



## CHECKING OUT

1. After checking out items you find one that needs attention and needs a work order placed on it, click on the ellipsis under "Loan Notes" once the item has been scanned/entered. It is important to note that one should fill out the work order after checking out the item to a patron.

Patron Services

Active balance: 0.00 USD  
 ID: 20112000326602  
 User group: FACULTY

Send Activity Report  
 Send Requests Report

1. User has 2 overdue item(s), 0 in this library.  
 2. User has 11 item(s) waiting for pickup at Main Stacks library.

Loans Returns Requests Network Activity

Scan item barcode \*  Look-up or select

1 - 1 of 1 Change Due Date

Loan Display: Loans of this session

Title	Due Date	Barcode	Fine	Loan Date	Loan Status	Item Policy	Library	Loan Notes
1 <input type="checkbox"/> I.M. Pei : a profile in American architecture / Carter Wiseman.	08/27/2020 22:00:00 CDT	30112052696116	-	05/07/2020	Normal	BOOK 16/4 WKS	Architect... and Art Library	<input type="button" value="Work Order"/>

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2. Select "Work Order" from the drop down menu.

Patron Services

Active balance: 0.00 USD  
 ID: 20112000326602  
 User group: FACULTY

Send Activity Report  
 Send Requests Report

1. User has 2 overdue item(s), 0 in this library.  
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3. The Place Item in Process screen will open. In the "Process Type" field, click on the down arrow to open the drop down menu.

The screenshot shows the 'Place Item in Process' form in Alma. The form includes a title 'I.M. Pei : a profile in American architecture / Carter Wiseman.', the institution 'University of Illinois at Urbana-Champaign (UIU) - Champaign and Urbana, IL', and a 'Place Item in Process' section. The 'Process Type' field is currently empty, and a small orange box highlights the downward arrow on the right side of the field. A larger orange arrow points from the right towards this arrow.

4. Select the department to which you want to route the item.

The screenshot shows the 'Place Item in Process' form with the 'Process Type' dropdown menu open. The dropdown menu lists several departments: Acquisition technical services, Acquisitions, Bookstacks Office, Cataloging, DRES - CAS - Phone Center, Digitization Services, In-Transit, and Preservation Services. An orange arrow points from the right towards the dropdown menu.

5. Since the item is in hand and not on the shelf, check the "Do not pick from shelf" box. Make a brief note of what action is to be taken in the "Note" field. Select the Managing Department from the drop down menu. At this point in time, the name of

the Managing Department is almost always the same as the Process Type.

< Place Item in Process

I.M. Pei : a profile in American architecture / Carter Wiseman.

**Institution** University of Illinois at Urbana-Champaign (UIU) –Champaign and Urbana, IL

Place Item in Process

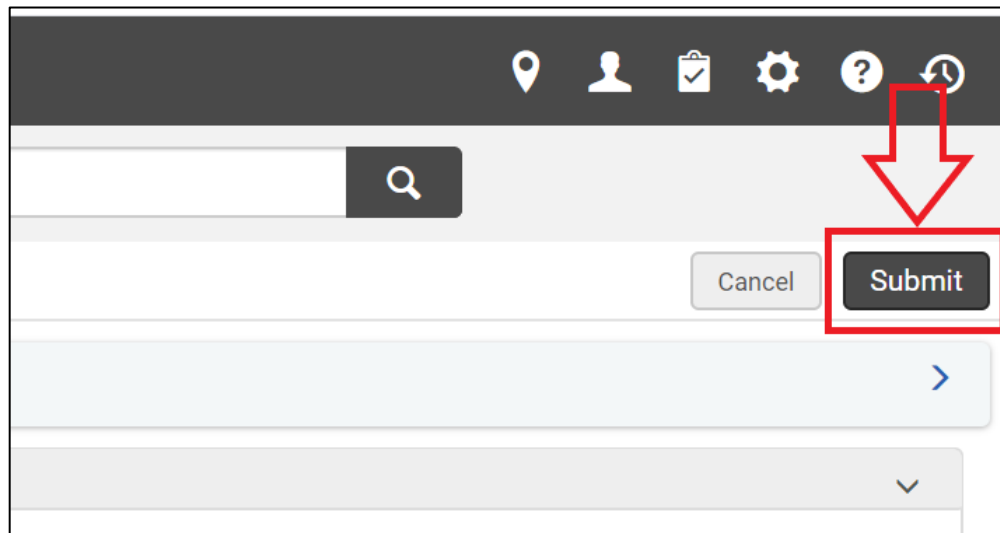
Process Type \* Preservation Services

Do not pick from shelf

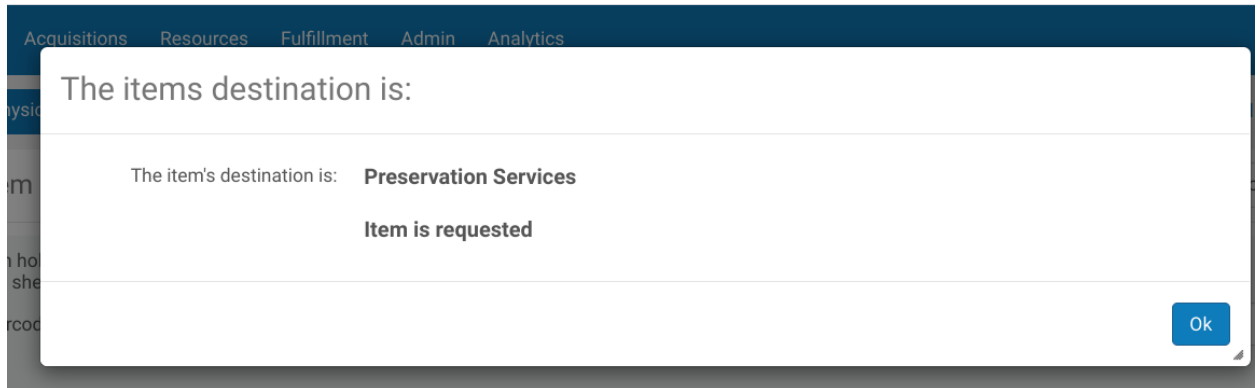
Note Torn Pages need repair

Managing Department \* Preservation Services

6. Click the "Submit" button. The item remains checked out to the patron, but it is now flagged to be routed to a work department when it is returned.

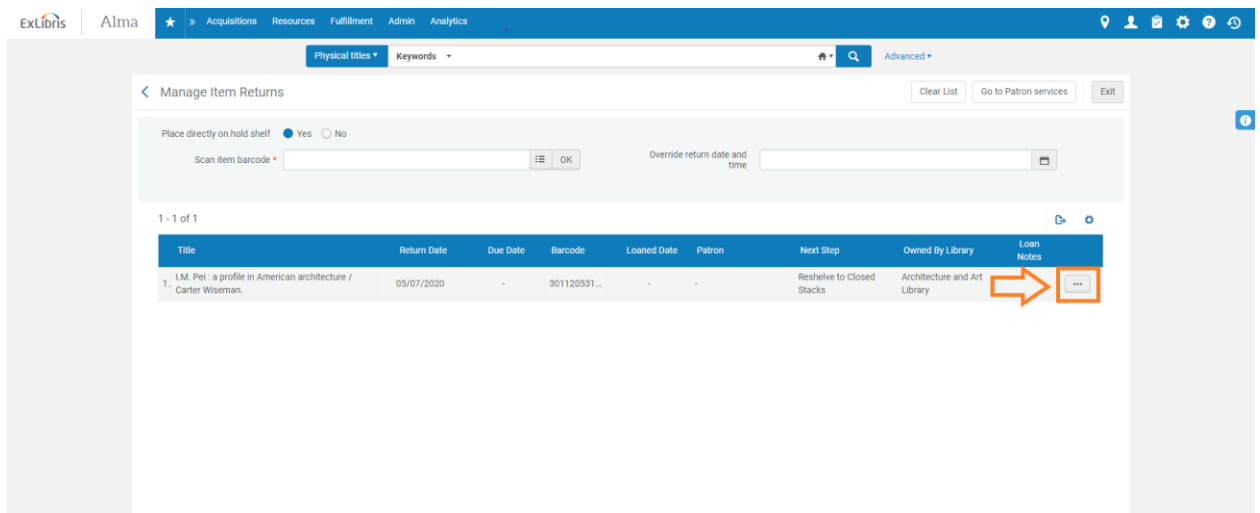


7. When the item is returned, a pop up screen will appear telling you where to send the item.



## Manage Item Returns

1. If while checking in items you find one that needs attention, and need to place a work order on the item, click on the ellipsis under "Loan Notes" once the item has been scanned/returned.



- a. Note that in this example below the returned item already has a work order request as can be seen in the "Next Step" column. The "Items Destination" pop up will display, and a routing streamer will print for the work order department.

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Acquisitions Resources Fulfillment Admin Analytics

Physical titles Keywords

Manage Item Returns

Place directly on hold shelf  Yes  No

Scan item barcode \*

1 - 1 of 1

Title	Return Date	Due Date	Barcode	Loaned Date	Patron	Next Step	Owned By Library	Loan Notes
1 I.M. Pei : a profile in American architecture / Carter Wiseman.	05/07/2020	08/27/2020 22:00:00 CDT	301120...	05/07/2020	Fish, Stackles	Preservation Services	Architecture and Art Library	

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Acquisitions Resources Fulfillment Admin Analytics

The items destination is:

The item's destination is: **Preservation Services**

**Item is requested**

Ok

2. Select "Work Order" from the drop down menu.

Manage Item Returns

Place directly on hold shelf  Yes  No

Scan item barcode   Override return date and time

1 - 1 of 1

Title	Return Date	Due Date	Barcode	Loaned Date	Patron	Next Step	Owned By Library	Loan Notes
I.M. Pei : a profile in American architecture / Carter Wiseman.	05/07/2020	-	301120531...	-	-	Reshelve to Closed Stacks	Architecture and Art Library	...

- View Queue
- Work Order
- View hidden

3. The Place Item in Process screen will open. In the "Process Type" field, click on the down arrow to open the drop down menu.

Place Item in Process

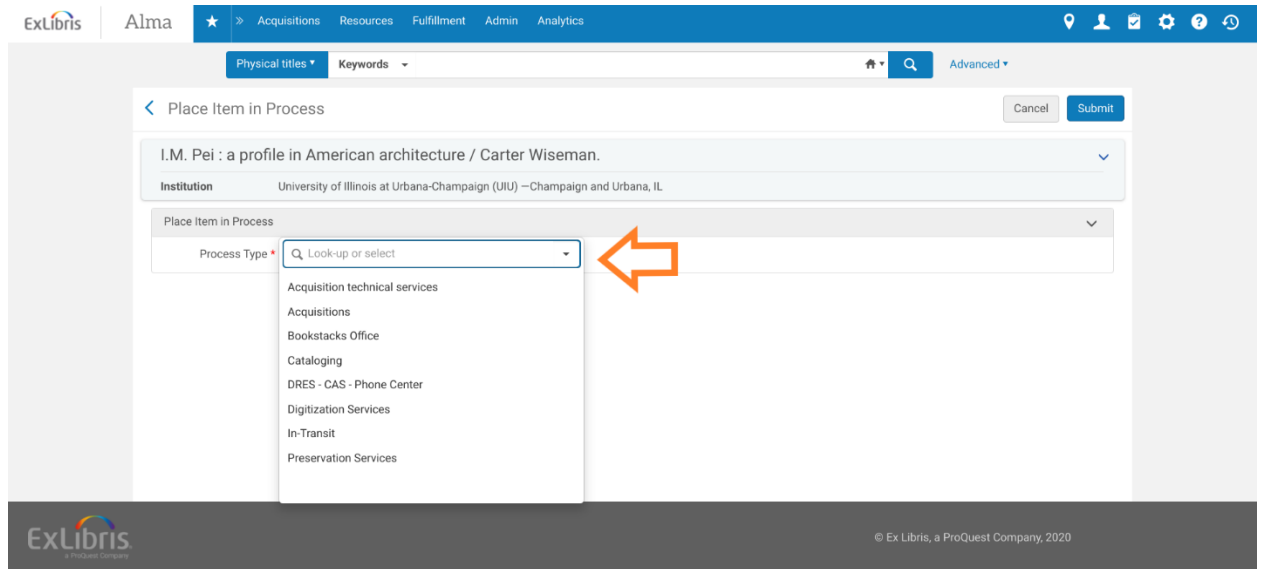
I.M. Pei : a profile in American architecture / Carter Wiseman.

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Place Item in Process

Process Type

4. Select the department to which you want to route the item.



5. The item is in hand and not on the shelf, check the "Do not pick from shelf" box. Make a brief note of what action is to be taken in the "Note" field. Select the Managing Department from the drop down menu.



< Place Item in Process

I.M. Pei : a profile in American architecture / Carter Wiseman.

**Institution** University of Illinois at Urbana-Champaign (UIU) –Champaign and Urbana, IL

Place Item in Process

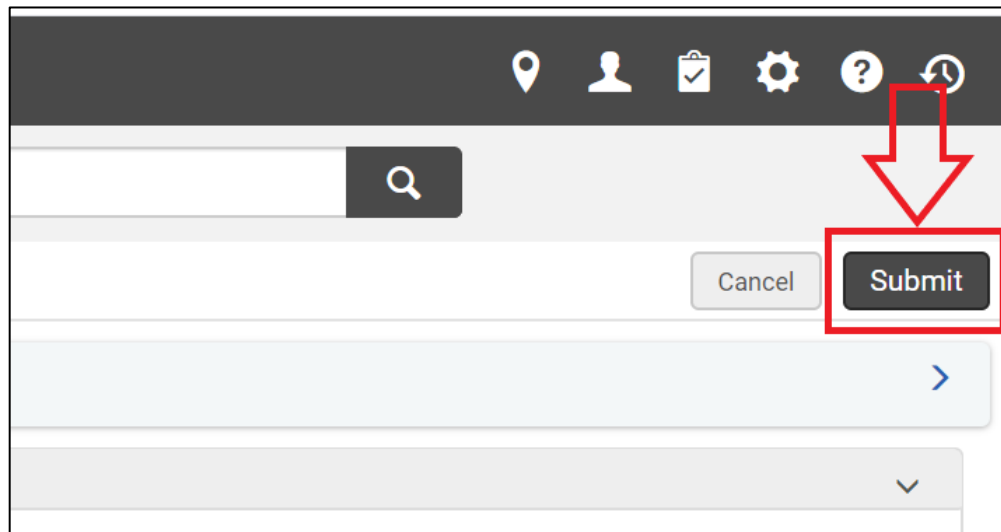
Process Type \* Preservation Services

Do not pick from shelf

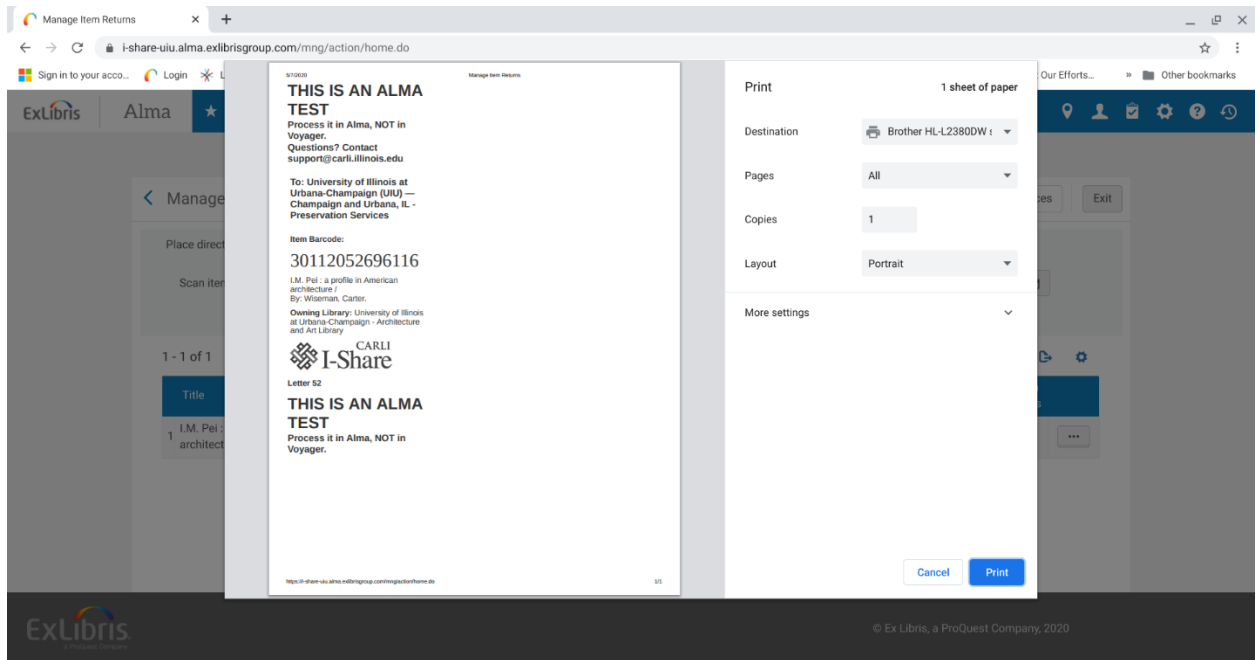
Note Torn Pages need repair

Managing Department \* Preservation Services

6. Click the "Submit" button and send the item to the appropriate work department.



7. A routing streamer will print, and you will be able to send it to the appropriate work order department.



Ending notes: When working at a fulfillment desk, it is best practice to only place a work order on an item that belongs to your library. For instance, Main Stacks will only place a work order on Main Stacks items. If you receive an item from a different owning library, please route the item to the owning department to place a work order on that item. Example: if a Main Stacks item is returned to the Art and Architecture library and is damaged, please route the item back to the Main Stacks to make a determination on that item and whether or not a work order will be placed on it.