

Placing a Work Order

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Introduction

A Work Order is an internal, staff-driven request. We create a Work Order when an item needs to be routed to another department for 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 several ways to create a Work Order in Alma.

- If the item is being put on hold for a patron (whether it's going to your Hold Shelf or another library's Hold Shelf), or if the item is being checked out to a patron, then go to the [Items Going Out to Patrons](#) section.
- If the item is being returned by a patron, then go to the [Returned Items](#) section.
- Otherwise, you can use the steps below under "Placing Work Orders". There is a different path to selecting a Work Order for Found Items depending on whether you prefer to search for the item using "[Physical Items](#)" or "[Physical Titles](#)" as the first search parameter.
 - Searching for an item using "Physical Items" will allow you to get to the Work Order option quicker than searching for "Physical Titles", but either option will give the same result in the end.
 - Searching under "Physical Items" will return a list of the individual item record(s). Searching under "Physical Titles" will return the bibliographic record, and you would need to open the list of items under that bib record in order to place a Work Order on the specific item.

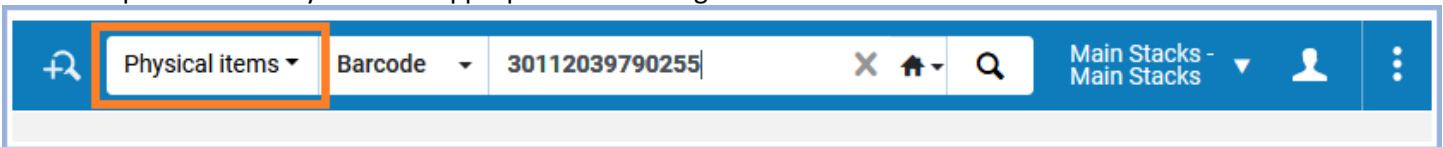
Placing Work Orders – “Physical Items” Parameter

Basic Steps:

- Search for the item using the first parameter “Physical Items”.
- Click the “...” button on the item’s record and select “Work Order” from the drop-down menu to open the “Place Item in Process” screen.
- Select the appropriate department to send the item to.
- Check or uncheck the “Do not pick from shelf” checkbox, as appropriate:
 - Item in hand: If you have the item with you, the box should be checked.
 - Item on shelf: If the item still needs to be retrieved, make sure the box is unchecked.
- Add a note about what needs to be done with the item.
- If needed, select the Managing Department from the drop-down menu.
- Click “Submit”.
- Once you have the item in hand, scan it in the “Scan in Items” screen. Print the Routing Slip and put it in the item.

Detailed Workflow:

1. In the Persistent Search Box at the top of the screen in Alma, set the first search parameter to “Physical Items”. The other parameters may be set as appropriate for finding the item’s record.



The screenshot shows the Alma search bar with the following elements:

- A magnifying glass icon on the left.
- A dropdown menu with "Physical items" selected, highlighted by an orange box.
- A dropdown menu with "Barcode" selected.
- A text input field containing "30112039790255".
- Buttons for "X" (clear), "Home" (house icon), and "Search" (magnifying glass icon).
- Text "Main Stacks - Main Stacks" with a dropdown arrow.
- A user profile icon.
- A vertical ellipsis menu icon.

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

The screenshot shows the ExLibris interface. At the top, there is a search bar with the text "Physical items", "Barcode", and "30112039790255". The main content area displays a search result for the book "In a land of plenty : a Don West reader ; with sketches by Constance Adams West." The barcode "30112039790255" is highlighted in yellow. The item details are organized into three columns: Call Number (811 W5211), Call Number Type (Dewey Decimal classification), Status (Item in place), Due back (-), and Material Type (Book). Other details like Item ID, Holdings ID, and MMS ID are also listed. The ellipsis button in the top right of the item record is highlighted with an orange box.

Physical Items (1 - 1 of 1) | 30112039790255

Save Query

Institution | Network | Community

Select All | Sort by: Title - Asc | Secondary Sort by: Rank

0 rows selected | Manage Selected

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

Book By West, Don. (Minneapolis, Minn. : West End Press, 1982.)

Barcode: 30112039790255

Library: Main Stacks

Creation Date: 04/21/2002 19:00:00 CDT

Modification Date: 08/28/2021 07:25:45 CDT

Expected Arrival Time: -

On Hold Expiration Date: -

Due Date: -

Needed By: -

Until: -

Permanent Location: Stacks

Other details

Call Number: 811 W5211

Call Number Type: Dewey Decimal classification

Status: Item in place

Due back: -

Material Type: Book

Item ID: 236692197400 05899

Holdings ID: 226692197500 05899

MMS ID: 994742412205 899

3. Select "Work Order".

The screenshot shows a library catalog interface. At the top, there are navigation tabs for 'Institution', 'Network', and 'Community'. Below these are filters for 'Select All', 'Sort by: Title - Asc', and 'Secondary Sort by: Rank'. A status bar indicates '0 rows selected' and 'Manage Selected'. A 'More actions' dropdown menu is open, showing options: 'Resource sharing request', 'Work Order' (highlighted with an orange box), 'Holdings', 'Display in Discovery', and 'Items'. The main record is for the book 'In a land of plenty : a Don West reader ; with sketches by Constance Adams West.' with various metadata fields like 'Book', 'Barcode', 'Library', 'Creation Date', 'Modification Date', 'Expected Arrival Time', 'On Hold Expiration Date', 'Due Date', 'Needed By', 'Until', and 'Permanent Location'. A link for 'Other details' is at the bottom of the record.

Institution **Network** **Community**

Select All Sort by : Title - Asc Secondary Sort by : Rank

0 rows selected Manage Selected More actions

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

Book By West, Don. (Minneapolis, Minn. : West End Press, 1982.)
Barcode: **30112039790255**
Library: Main Stacks
Creation Date: 04/21/2002 19:00:00 CDT
Modification Date: 08/28/2021 07:25:45 CDT
Expected Arrival Time: -
On Hold Expiration Date: -
Due Date: -
Needed By: -
Until: -
Permanent Location: Stacks

Call Number: 811 W5211
Call Number Type: Dewey Decimal classification
Status: Item in place
Due back: -
Material Type: Book

Item ID: 23669205899
Holdings: 22669205899
MMS ID: 994742899

More actions
Resource sharing request
Work Order
Holdings
Display in Discovery
Items

[Other details](#)

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.

Place Item in Process

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

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

Place Item in Process

Process Type *

5. Select the department where you want the item to be routed.

Place Item in Process

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

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

Place Item in Process

Process Type *

- ACS Cataloging
- Acquisitions
- Acquisitions technical Services
- Bookstacks Office
- CMS Off-site Digitization
- CMS Project
- Digitization Services
- International and Area Studies
- Law Library
- Music and Performing Arts
- Preservation Services
- Teaching, Learning, and Academic Support
- UGL In Process

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6. Determine if the “Do not pick from shelf” checkbox should be checked.
- a. **Item in hand:** If you have the physical item with you, the checkbox should have a checkmark.

Place Item in Process

Process Type * **Preservation Services** ▼

Do not pick from shelf ←

Note

Managing Department * **Preservation Services** ▼

- b. **Item on shelf:** If the item still needs to be retrieved from the bookshelves, the checkbox should be empty.

Place Item in Process

Process Type * **Acquisitions technical Services** ▼

Do not pick from shelf ←

Note

Managing Department * ▼

7. Make a brief note of what action is to be taken in the “Note” field.

The screenshot shows the 'Place Item in Process' form. At the top, there is a back arrow, the title 'Place Item in Process', and 'Cancel' and 'Submit' buttons. Below this is a header section with a dropdown menu containing the text 'In a land of plenty : a Don West reader ; with sketches by Constance Adam...' and the institution 'University of Illinois at Urbana-Champaign (UIU) —Champaign and Urbana, IL'. The main form area has a dropdown menu for 'Place Item in Process'. Below that, there are several fields: 'Process Type' with a dropdown menu set to 'Preservation Services', a checked checkbox for 'Do not pick from shelf', a 'Note' field containing the text 'Pages 3-8 are torn.' (this field is highlighted with an orange border), and 'Managing Department' with a dropdown menu set to 'Preservation Services'. At the bottom, there are fields for 'Additional Request Attributes' and 'Manual Priority'.

8. If the Managing Department hasn't already been filled in for you, select the Managing Department from the drop-down menu. This is almost always the same as the Process Type.

This screenshot is similar to the previous one, but the 'Managing Department' dropdown menu is open, showing a search bar with the text 'Look-up or select' and a dropdown arrow. An orange arrow points to this dropdown menu. The 'Note' field still contains 'Pages 3-8 are torn.'. The 'Process Type' dropdown is still set to 'Preservation Services'. The 'Do not pick from shelf' checkbox is checked. The 'Additional Request Attributes' dropdown is also visible, showing 'Preservation Services'.

9. Click the "Submit" button.

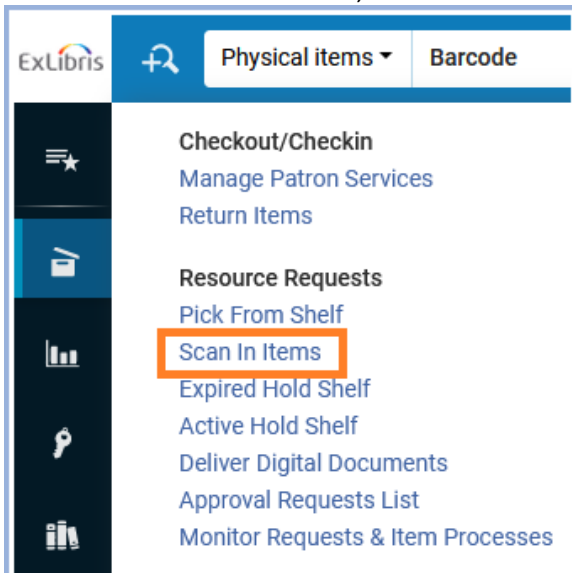
The screenshot shows a web form titled "Place Item in Process". At the top right are "Cancel" and "Submit" buttons. The form contains the following fields:

- Title: "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"
- Process Type: "Preservation Services" (dropdown menu)
- Do not pick from shelf:
- Note: "Pages 3-8 are torn." (text area)
- Managing Department: "Preservation Services" (dropdown menu)
- Additional Request Attributes: (dropdown menu)
- Manual Priority: (dropdown menu)

An orange arrow points to the "Submit" button.

10. If you have the item in hand, go to step 11. If the item is on the shelf and the "Do not pick from shelf" checkbox was unchecked, the item will show up on the Pick From Shelf list to be retrieved. Once you have the item in hand, go to step 11.

11. In the "Fulfillment" menu, under "Resource Requests", click on "Scan in Items".



12. Scan in the item.

Scan In Items Manage In Process Items Exit

Scan in Items Change Item Information

Automatically print slip Yes No

Register in-house use

Work Order Type

Scan item barcode * OK Create Item

Scan request ID OK

13. Print the Routing Slip and put it in the item.

To: University of Illinois at Urbana-Champaign (UIU) — Champaign and Urbana, IL - Preservation Services


ILDS Code: UIU

Note: Pages 3-8 are torn.

Item Barcode:
30112039790255

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

Owning Library: Main Stacks



Print 1 sheet of paper

Destination EPSON TM-T88IV Rec

Pages All

Copies 1

Layout Portrait

Color Black and white

More settings ▼

Print Cancel

14. From here, follow your usual procedure for shipping items to other departments.

Placing Work Orders – “Physical Titles” Parameter

Basic Steps:

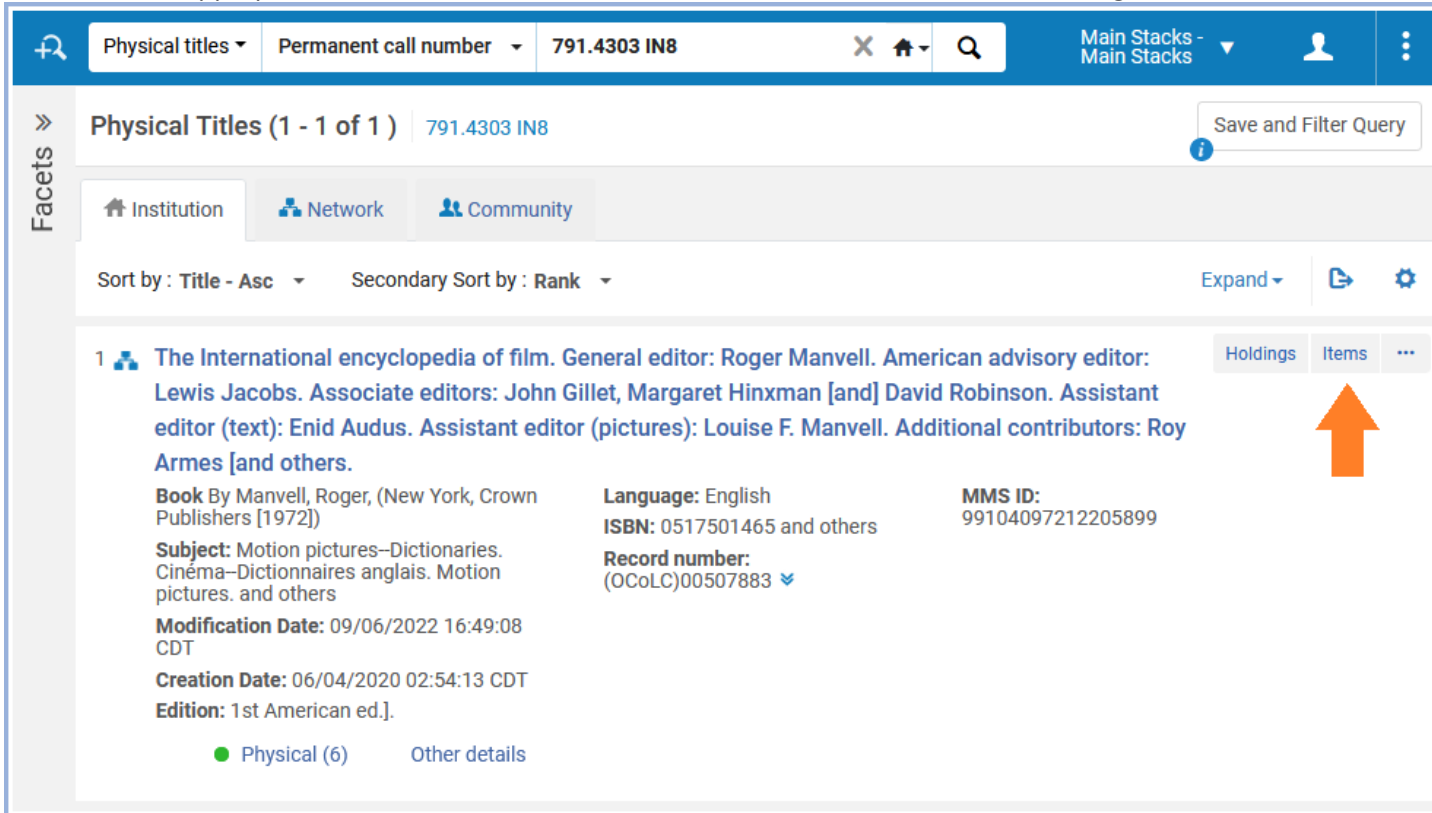
- Search for the item using the first parameter “Physical Titles”.
- Click the “Items” button. (If it’s not visible, click the “...” button and select “Items” from the drop-down menu).
- In the list of items, find the appropriate one and click the “...” button on the right side. Select “Work Order” from the drop-down menu to open the “Place Item in Process” screen.
- Select the appropriate department to send the item to.
- Check or uncheck the “Do not pick from shelf” checkbox, as appropriate:
 - Item in hand: If you have the item with you, the box should be checked.
 - Item on shelf: If the item still needs to be retrieved, make sure the box is unchecked.
- Add a note about what needs to be done with the item.
- If needed, select the Managing Department from the drop-down menu.
- Click “Submit”.
- Once you have the item in hand, scan it in the “Scan in Items” screen. Print the Routing Slip and put it in the item.

Detailed Workflow:

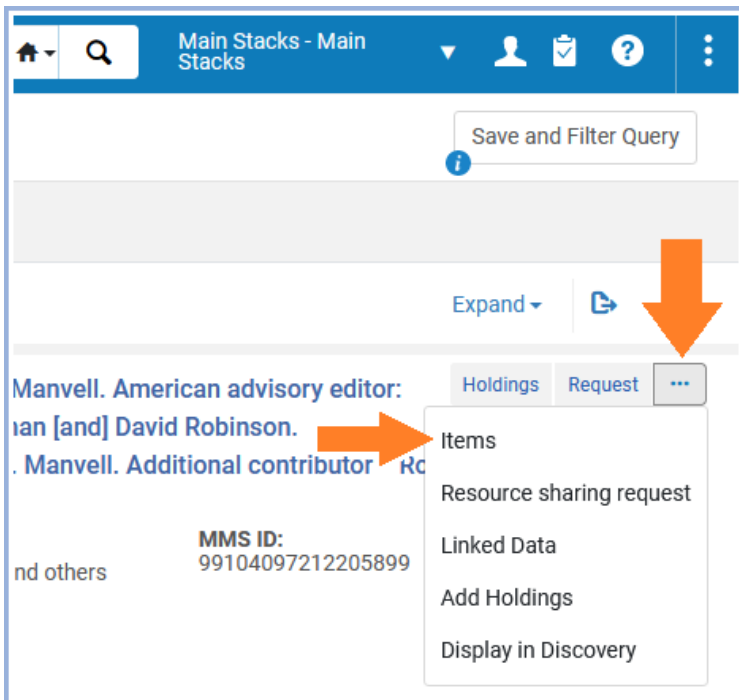
1. On the main Alma screen, set the first search parameter to “Physical Titles”. The other parameters may be set as appropriate for finding the item’s record.



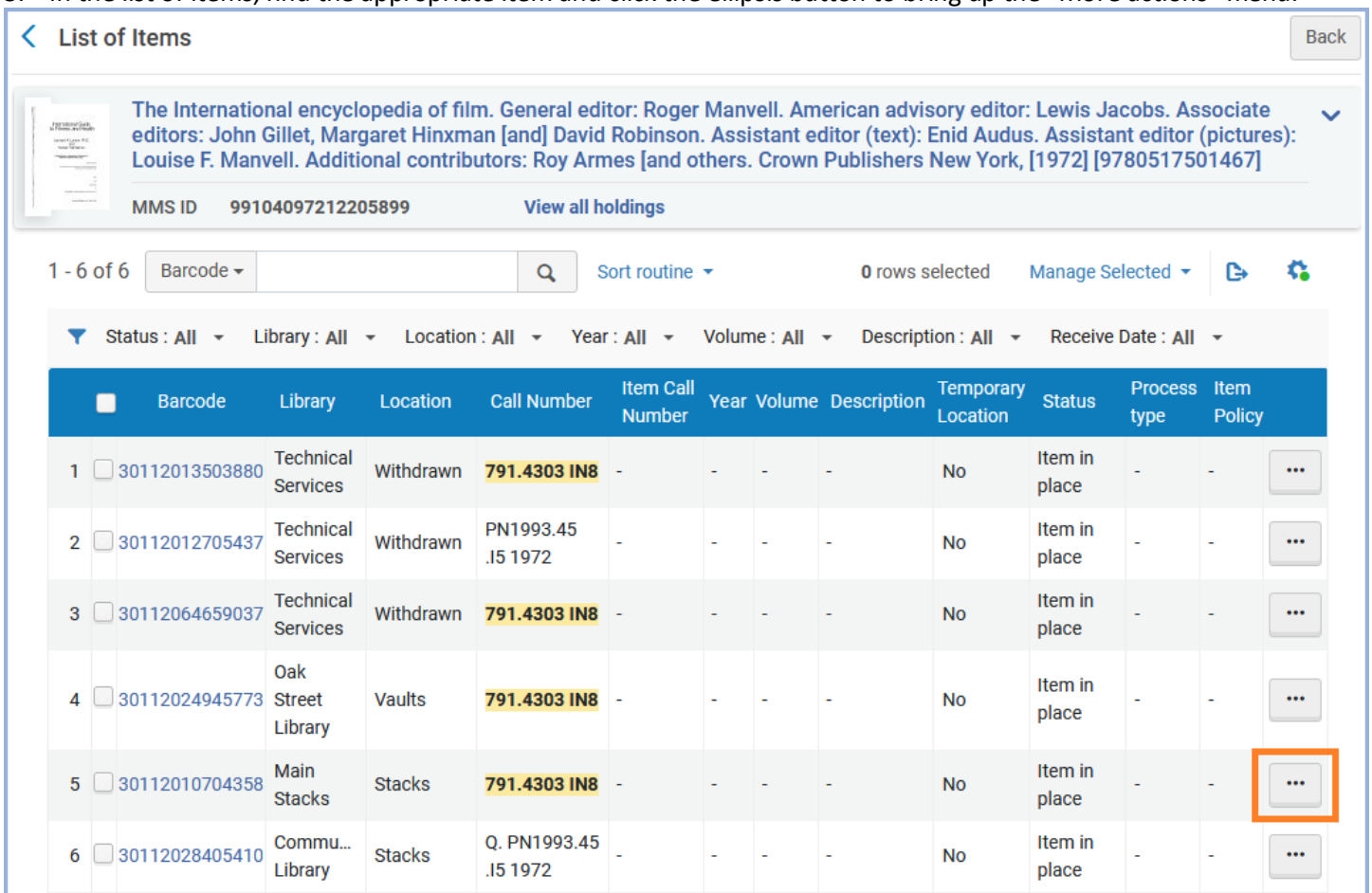
2. Locate the appropriate record in the list of results, then click the “Items” button on the right side.



Note: If the “Items” button isn’t available, click the ellipsis button to bring up the “More actions” menu, and then select “Items”.



3. In the list of items, find the appropriate item and click the ellipsis button to bring up the “More actions” menu.



4. Select "Work Order" from the drop-down menu.

← List of Items Back


The International encyclopedia of film. General editor: Roger Manvell. American advisory editor: Lewis Jacobs. Associate editors: John Gillet, Margaret Hinxman [and] David Robinson. Assistant editor (text): Enid Audus. Assistant editor (pictures): Louise F. Manvell. Additional contributors: Roy Armes [and others. Crown Publishers New York, [1972] [9780517501467]

MMS ID 99104097212205899 [View all holdings](#)

1 - 6 of 6 Barcode Sort routine Manage Selected

▼ Status : All ▼ Library : All ▼ Location : All ▼ Year : All ▼ Volume : All ▼ Description : All ▼ Receive Date : All ▼

<input type="checkbox"/>	Barcode	Library	Location	Call Number	Item Call Number	Year	Volume	Description	Temporary Location	Status	Process	Item
1	<input type="checkbox"/> 30112013503880	Technical Services	Withdrawn	791.4303 IN8	-	-	-	-	No	Item in place	View	
2	<input type="checkbox"/> 30112012705437	Technical Services	Withdrawn	PN1993.45 .J5 1972	-	-	-	-	No	Item in place	Edit	
3	<input type="checkbox"/> 30112064659037	Technical Services	Withdrawn	791.4303 IN8	-	-	-	-	No	Item in place	Request	
4	<input type="checkbox"/> 30112024945773	Oak Street Library	Vaults	791.4303 IN8	-	-	-	-	No	Item in place	Duplicate	
5	<input type="checkbox"/> 30112010704358	Main Stacks	Stacks	791.4303 IN8	-	-	-	-	No	Item in place	Change Location	
6	<input type="checkbox"/> 30112028405410	Commu... Library	Stacks	Q. PN1993.45 .J5 1972	-	-	-	-	No	Item in place	Toggle Missing Status	



5. The "Place Item in Process" screen will open.

← Place Item in Process Cancel

The International encyclopedia of film. General editor: Roger Manvell. American advisor...

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

Place Item in Process

Process Type *

6. Proceed as outlined in [steps 4-14](#) in the above section (starting on page 6).

Items Going Out to Patrons

Sometimes an item that is going on hold or being checked out to a patron will need a Work Order (for example, there may be a discrepancy between the call number on the item and the one in Alma, or an item might have minor damage that can be fixed after the item is returned). These Work Orders should be placed **after** the item is put on hold for the patron or checked out to the patron.

Note: If the item is from another departmental library, make a note of the information and notify that library instead of placing the Work Order yourself.

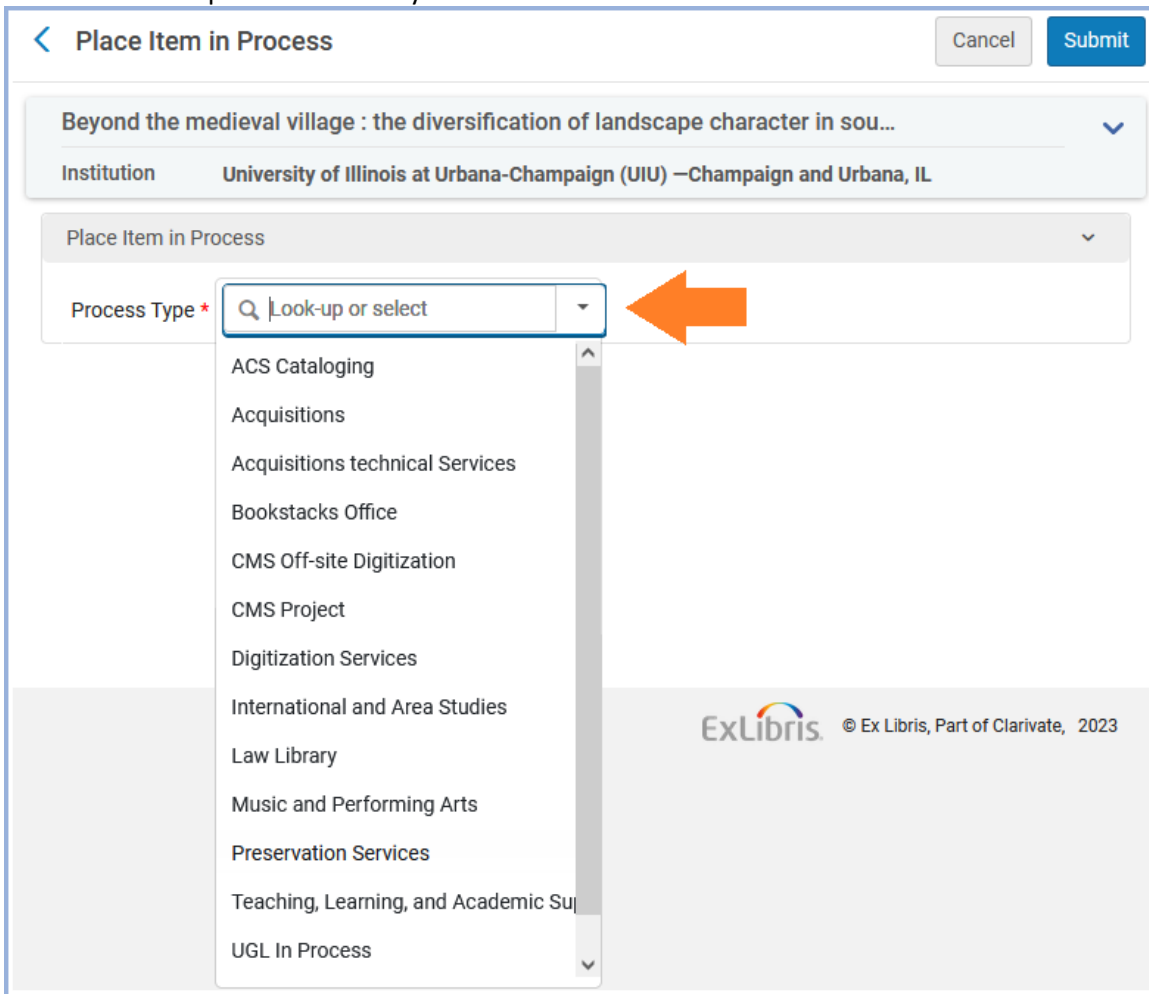
Basic Steps:

- First, process the item to either put it on the Hold Shelf, route it to a different Hold Shelf, or check it out to the patron.
- Next, search for the item in Alma. Open the “Place Item in Process” screen by clicking the “...” menu for that specific item and selecting “Work Order”. (See above sections for detailed instructions.)
- Select the appropriate department to send the item to.
- Check the “Do not pick from shelf” checkbox.
- Add a note about what needs to be done with the item.
- If needed, select the Managing Department from the drop-down menu.
- Click “Submit”.
- When the item is returned, a pop-up screen and a Routing Slip will appear. Print the Routing Slip, put it in the item, and route the item to that department.

Detailed Workflow:

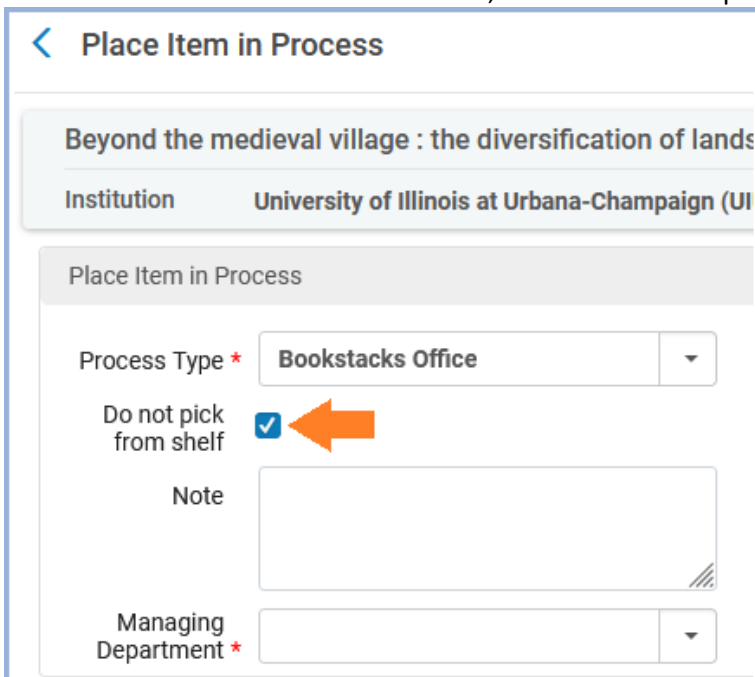
1. Start by processing the item:
 - a. If it’s being **put on hold for a patron**, follow the usual procedure until you have printed the Hold Shelf Slip (for items being put on your own Hold Shelf) or the Routing Slip (for items being sent to another library’s Hold Shelf). Put the slip in the item, and then go to step 2.
 - b. If it’s being **checked out to a patron**, make a note of the item information and what needs to be done with the item, and then finish checking out all the patron’s item(s). Once the patron interaction is finished, go to step 2.
2. Pull up the item in Alma using the Persistent Search Box at the top of the page, and open the “Place Item in Process” screen for that item.
 - a. If you searched using the “Physical Items” parameter, click the ellipsis button on the right side and select “Work Order” from the drop-down menu. (See [Placing Work Orders – “Physical Items” Parameter](#) for details.)
 - b. If you searched using the “Physical Titles” parameter, click the “Items” button (or click the ellipsis button and select “Items” from the drop-down menu) to reach the list of items. Then click the ellipsis on the right side of the appropriate item and select “Work Order” from the drop-down menu. (See [Placing Work Orders – “Physical Titles” Parameter](#) for details.)

3. In the “Place Item in Process” screen, click the down arrow in the “Process Type” field to open the drop-down menu. Select the department where you want to route the item once it has been returned.



The screenshot shows the 'Place Item in Process' interface. At the top, there is a back arrow, the title 'Place Item in Process', and 'Cancel' and 'Submit' buttons. Below this, the item title 'Beyond the medieval village : the diversification of landscape character in sou...' is displayed with a dropdown arrow. The institution is 'University of Illinois at Urbana-Champaign (UIU) –Champaign and Urbana, IL'. The 'Place Item in Process' section has a dropdown arrow. The 'Process Type *' field is open, showing a search bar with 'Look-up or select' and a list of departments: ACS Cataloging, Acquisitions, Acquisitions technical Services, Bookstacks Office, CMS Off-site Digitization, CMS Project, Digitization Services, International and Area Studies, Law Library, Music and Performing Arts, Preservation Services, Teaching, Learning, and Academic Support, and UGL In Process. An orange arrow points to the dropdown arrow of the 'Process Type' field. The ExLibris logo and copyright notice '© Ex Libris, Part of Clarivate, 2023' are visible in the bottom right.

4. Since the item isn't on the bookshelf, check the “Do not pick from shelf” checkbox.



The screenshot shows the 'Place Item in Process' interface. The 'Process Type *' field is now set to 'Bookstacks Office'. The 'Do not pick from shelf' checkbox is checked, indicated by an orange arrow. Below this is a 'Note' text area. At the bottom, the 'Managing Department *' field is empty with a dropdown arrow.

5. Make a brief note of what action is to be taken in the “Note” field.

The screenshot shows the 'Place Item in Process' form. At the top, there is a title 'Place Item in Process' with a back arrow on the left and 'Cancel' and 'Submit' buttons on the right. Below the title is a dropdown menu showing 'Beyond the medieval village : the diversification of landscape character in sou...'. Underneath, the 'Institution' is set to 'University of Illinois at Urbana-Champaign (UIU) –Champaign and Urbana, IL'. The main section is titled 'Place Item in Process' and contains several fields: 'Process Type' is a dropdown menu set to 'Bookstacks Office'; 'Do not pick from shelf' is a checked checkbox; 'Note' is a text area containing the text 'The call number in Alma is 307.7209422 R486b, but on the spine, it says 307.7709422 R486b.'; 'Managing Department' is a dropdown menu currently empty; 'Additional Request Attributes' is a dropdown menu; and 'Manual Priority' is a dropdown menu.

6. If the Managing Department hasn't already been filled in for you, select the Managing Department from the drop-down menu. This is almost always the same as the Process Type.

This screenshot shows the same 'Place Item in Process' form as above, but with the 'Managing Department' dropdown menu open. The dropdown menu is currently empty and shows a search icon and the text 'Look-up or select'. An orange arrow points to the dropdown menu. The 'Note' field is still visible and contains the same text as in the previous screenshot. The 'Process Type' is still 'Bookstacks Office' and 'Do not pick from shelf' is still checked.

7. Click the "Submit" button.

< Place Item in Process Cancel Submit

Beyond the medieval village : the diversification of landscape character in sou...

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

Place Item in Process

8. The item is now flagged to be routed to that department when it is returned.

Note: This does not affect the patron's loan.

9. When the item is returned, a pop-up screen and a Routing Slip will appear. Print the Routing Slip and put it in the item, and then send the item on its way to that department.

1/9/23, 9:57 AM Manage Item Returns

To: University of Illinois at Urbana-Champaign (UIU) - Champaign and Urbana, IL - Bookstacks Office

ILDS Code: UIU

Note: The call number in Alma is 307.7209422 R486b, but on the spine, it says 307.7709422 R486b.

Item Barcode:

3 0 1 1 2 0 9 6 6 9 7 6 0 9

Beyond the medieval village : the diversification of landscape character in southern Britain / By: Rippon, Stephen,

Owning Library: Main Stacks

CARLI I-Share

Print 1 sheet of paper

Destination EPSON TM-T88IV Rec

Pages All

Copies 1

Layout Portrait

Color Black and white

More settings

Print Cancel

<https://i-share-uiu.alma.exlibrisgroup.com...> 1/1

Returned Items

A patron may return an item that needs attention. The item might have a Work Order on it already, in which case checking the item in will cause a Routing Slip printing option to pop up, and you can just print the slip and send the item on its way. If it doesn't have a Work Order yet, you can place a Work Order on the item directly from the list of returned items after you check it in.

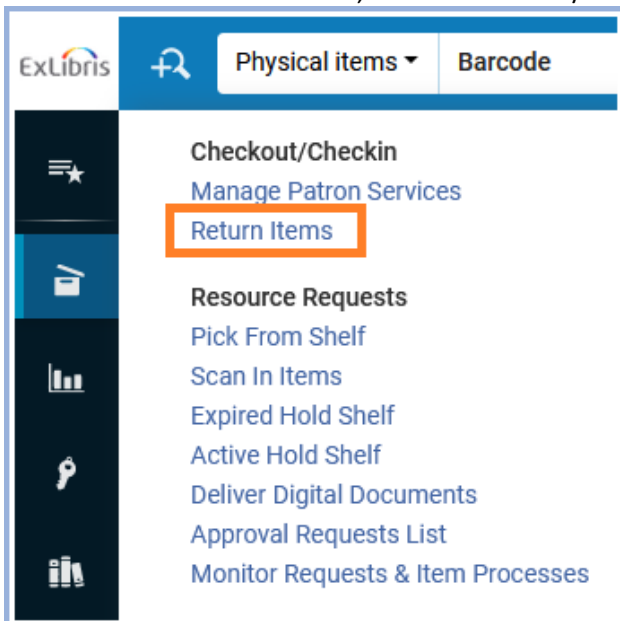
Note: If the returned item is from another departmental library, make a note of the information and notify that library instead of placing the Work Order yourself.

Basic Steps:

- Check that the item doesn't have damage caused by the patron. If it does, follow your department's procedure for such items instead. Otherwise, continue.
- Check in the item on the "Return Items" screen.
 - If the item has a Work Order on it already, it'll pop up an option to print a Routing Slip, along with a pop-up notification. If this happens, print the Routing Slip, put it in the item, and route the item to the department. Otherwise, continue.
- Click the "..." button on the right side of the item's entry in the list of returns.
- Select "Work Order" from the drop-down menu.
- Select the appropriate department to send the item to.
- Check the "Do not pick from shelf" checkbox.
- Add a note about what needs to be done with the item.
- If needed, select the Managing Department from the drop-down menu.
- Click "Submit".
- Go to the "Scan in Items" screen and scan it in. Print the Routing Slip and put it in the item.

Detailed Workflow:

1. If the item has damage that may have been caused by the patron who had it checked out, and there's no note about it in Alma or condition streamer in the item, stop here and follow your department's procedure for items damaged by patrons. Otherwise, continue to step 2.
2. In the "Fulfillment" menu, under "Checkout/Checkin", go to the "Return Items" screen.



3. Check the item in on the “Return Items” screen **before** placing a Work Order.
 - a. The item may already have a Work Order in place. If so, print the Routing Slip and send the item to that department. Then click “OK” on the pop-up to close it.

The screenshot shows a 'Print' dialog box. On the left is a preview of a routing slip with the following text: '1/9/23, 9:57 AM Manage Item Returns', 'To: University of Illinois at Urbana-Champaign (UIU) — Champaign and Urbana, IL - Bookstacks Office', 'ILDS Code: UIU', a note about call numbers, a barcode, and book information. On the right, print settings are shown: 'Print 1 sheet of paper', 'Destination: EPSON TM-T88IV Rec...', 'Pages: All', 'Copies: 1', 'Layout: Portrait', and 'Color: Black and white'. At the bottom right, there are 'Print' and 'Cancel' buttons, with the 'Print' button highlighted by an orange box.

The screenshot shows a pop-up message box titled 'The item's destination is:'. It contains an information icon and a note: 'The request to be handled has a note: The call number in Alma is 307.7209422 R486b, but on the spine, it says 307.7709422 R486b.' Below the note, it states 'The item's destination is: **Bookstacks Office**' and 'Item is requested'. At the bottom right, there is an 'Ok' button highlighted with an orange box.

- b. If the item doesn't have a Work Order in place yet, continue to step 4.

4. Once the item has been scanned/returned, click the ellipsis button on right side.

The screenshot shows the 'Manage Item Returns' interface. At the top, there are buttons for 'Clear List', 'Go to Patron services', and 'Exit'. Below this is a search bar for 'Scan item barcode *' with a 'Look-up or select' button and an 'OK' button. To the right is an 'Override return date and time' field with a calendar icon. The main area displays '1 - 2 of 2' items in a table. The first item is 'From myth to fiction; the saga of Hadingus. Translated by Derek Coltman.' with a return date of 01/09/2023 and a due date of 05/01/2023. The patron is 'Ruxpin, Teddy'. The next step is 'Reshelve to Stacks' and it is owned by 'Main Stacks'. An ellipsis button in the 'Loan Notes' column is highlighted with an orange box.

Title	Return Date	Due Date	Barcode	Loaned Date	Patron	Next Step	Owned By Library	Loan Notes
1 From myth to fiction; the saga of Hadingus. Translated by Derek Coltman.	01/09/2023	05/01/2023 22:00:00 CDT	30112039476160	01/09/2023	Ruxpin, Teddy	Reshelve to Stacks	Main Stacks	...
2 Beyond the medieval village : the diversification of landscape character in southern Britain / Stephen Rippon.	01/09/2023	05/01/2023 22:00:00 CDT	30112096697609	01/09/2023	Bear, Fozzie	Booksta... Office	Main Stacks	...

5. Select "Work Order" from the drop-down menu. This will open the "Place Item in Process" screen.

This screenshot is similar to the previous one, but a dropdown menu is open over the first item. The menu options are: 'View Queue', 'View Notes', 'Work Order' (highlighted with an orange box), 'Select Return Date', and 'View hidden'.

Title	Return Date	Due Date	Barcode	Loaned Date	Patron	Next Step	Owned By Library	Loan Notes
1... From myth to fiction; the saga of Hadingus. Translated by Derek Coltman.	01/09/2023	05/01/2023 22:00:00 CDT	30112039476160	01/09/2023	Ruxpin, Teddy	Reshelve to Stacks	Main Stacks	...
2 Beyond the medieval village : the diversification of landscape character in southern Britain / Stephen Rippon.	01/09/2023	05/01/2023 22:00:00 CDT	30112096697609	01/09/2023	Bear, Fozzie	Booksta... Office	Main Stacks	...

6. Follow [steps 4-14](#) in the Placing Work Orders – “Physical Items” Parameter section above (starting on page 6).

Viewing a Work Order's Status

A Work Order falls under the category of "Requests" in Alma, and it can be looked up in the same ways as other requests.

Basic Steps:

- If you have information about the Work Order, you can look it up in the Persistent Search Box at the top of the page by using the first search parameter of "Requests".
 - If it doesn't show up, try changing the "Activity Status" to "All".
- If you don't have specific information about the item or the Work Order, you can look at the "Resource Request Monitoring" screen. In the "Fulfillment" menu, under "Resource Requests", go to "Monitor Requests & Item Processes".
 - You may need to narrow down the list using facets such as Owner, Request/Process Type, and/or Workflow Step.

Detailed Workflow:

1. If you have information about a specific Work Order (such as the Request ID number or the item's title or barcode), you can use it to search for the Work Order in the Persistent Search Box at the top of the page. Use "Requests" as the first search parameter. The other parameters may be set as appropriate.

The screenshot displays the Alma system interface for viewing a work order. At the top, a search bar shows the search criteria: "Requests" (highlighted with an orange box), "All", and the request ID "30112039790255". The main content area is titled "Resource Request Monitoring (1 - 1 of 1)" and shows details for a single request. On the left, a "Facets" sidebar lists various filters such as Type, Material Type, Workflow Step, Request/Process Type, Request Date, Date Needed By, and Workflow Step Status. The main details section includes a book cover for "In a land of plenty : a Don West reader ; with sketches by Constance Adams West." and a list of metadata fields: Request Type (Preservation Services), Request ID (30264890940005899), Creator, MMS ID (994742412205899), Pickup Location (Preservation Services), Barcode (30112039790255), Place in Queue (0), Call Number (811 W521I), Request Date (01/06/2023), Note (Pages 3-8 are torn), Material Type (Book), Workflow Step (Transit Item), Process Status (In Process), Managed By Library (Main Stacks), Managed By Desk (Main Stacks), Process Date (01/06/2023), and Expiration Date (01/07/2023). Buttons for "Cancel" and "Print Slip" are visible at the top right of the details section.

- When searching for requests in the Persistent Search Box, Alma automatically searches for those with an Activity Status of "Active". If you're looking for a Work Order without that status, you may not get the results you're looking for at first. In that case, use the drop-down menu for "Activity Status" to change it to "Completed" or "All".

Requests ▾ All ▾ 30312725090005899 X Q Main Stacks - Main Stacks ▾ 👤 ⋮

Facets << Resource Request Monitoring 30312725090005899

No facets available.

Activity Status : Active ▾ Include Pending Resource Sharing Requests : Yes ▾ Clear all

No records were found.

Requests ▾ All ▾ 30312725090005899 X Q Main Stacks - Main Stacks ▾ 👤 ⋮

Facets << Resource Request Monitoring 30312725090005899

No facets available.

Activity Status : Look-up or select ▾ ← Include Pending Resource Sharing Requests : Yes ▾ Clear all

- Active
- Completed
- All


re found.

- This will bring up both finished and rejected Work Orders.

Requests ▾ All ▾ 30312725090005899 X Q Main Stacks - Main Stacks ▾ 👤 ⋮

Resource Request Monitoring (1 - 1 of 1) 30312725090005899

Activity Status : All ▾

1  **Beyond the medieval village : the diversification of landscape character in southern Britain / Stephen Rippon.** [View Title in Search](#)

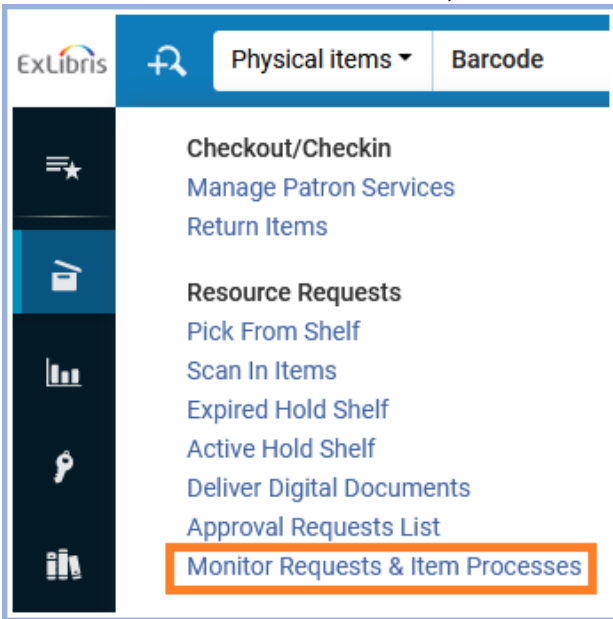
Request Type: Bookstacks Office **Call Number:** 307.7209422 R486b

ID: 30312725090005899 **Request Date:** 01/09/2023

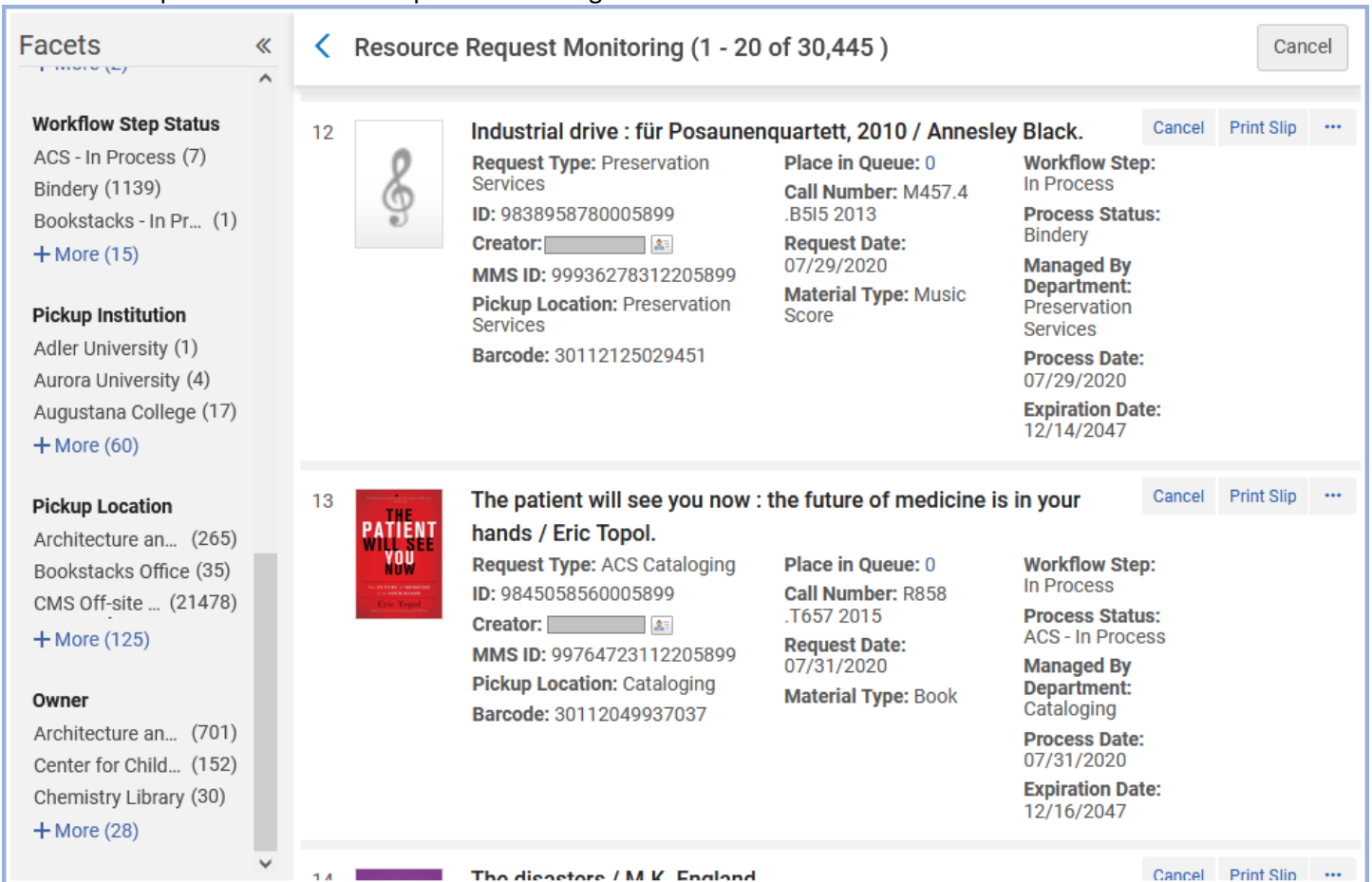
Creator: **Note:** The call number in Alma is

MMS ID: 00576064812205800

4. If you don't have information about a specific Work Order, you can check the "Resource Request Monitoring" screen. In the "Fulfillment" menu, under "Resource Requests", go to "Monitor Requests & Item Processes".



5. This will open the "Resource Request Monitoring" screen.



6. You may need to narrow down the list using the facets in the left sidebar. Some potentially useful facets are Owner (the library that owns the item in question), Request/Process Type, and Workflow Step Status. Once you've entered a facet, it will show up at the top of the list of requests. To remove a facet, click the circled "x" to the right of that facet.

The screenshot displays the 'Resource Request Monitoring' interface. On the left, a 'Facets' sidebar lists various filters: Type (In Process (5)), Material Type (Book (5)), Workflow Step (Transit Item (2), In Process (3)), Request Date (Today (5)), Date Needed By (Undefined (5)), Workflow Step Status (In Process (5)), and Pickup Institution (University of Illinois ... (5)). An orange arrow points to the 'Facets' header. The main content area shows a search filter for 'Request/Process Type: Preservation Services' with a circled 'x' next to it, and other filters for 'Owner: Main Stacks' and 'Request Date: Today'. An orange arrow points to the 'Preservation Services' facet. Below the filters, a list of requests is shown, with the first item being 'In a land of plenty : a Don West reader ; with sketches by Constance Adams West.' The request details include: Request Type: Preservation Services, ID: 30264890940005899, Creator: [redacted], MMS ID: 994742412205899, Pickup Location: Preservation Services, Barcode: 30112039790255, Place in Queue: 0, Call Number: 811 W5211, Request Date: 01/06/2023, Note: Pages 3-8 are torn, Material Type: Book, Workflow Step: Transit Item, Process Status: In Process, Managed By Library: Main Stacks, Managed By Desk: Main Stacks, Process Date: 01/06/2023, and Expiration Date: 01/06/2023. Buttons for 'Cancel', 'Print Slip', and a menu icon are visible next to the request entry.