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.
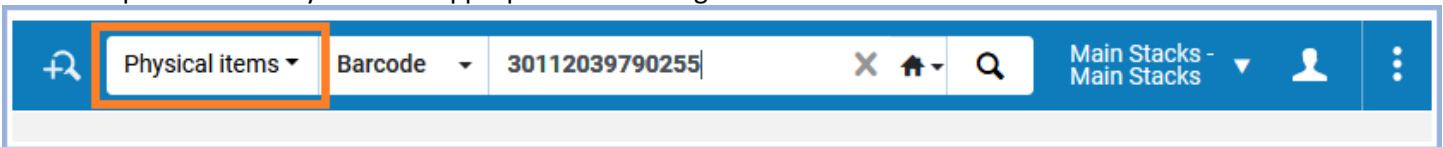
Placing Work Orders – "Physical Items" Parameter

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.

2. Locate the item's record, then click on the ellipsis button 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 where you want the item to be routed.

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.

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

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

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.

9. Click 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.

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

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:
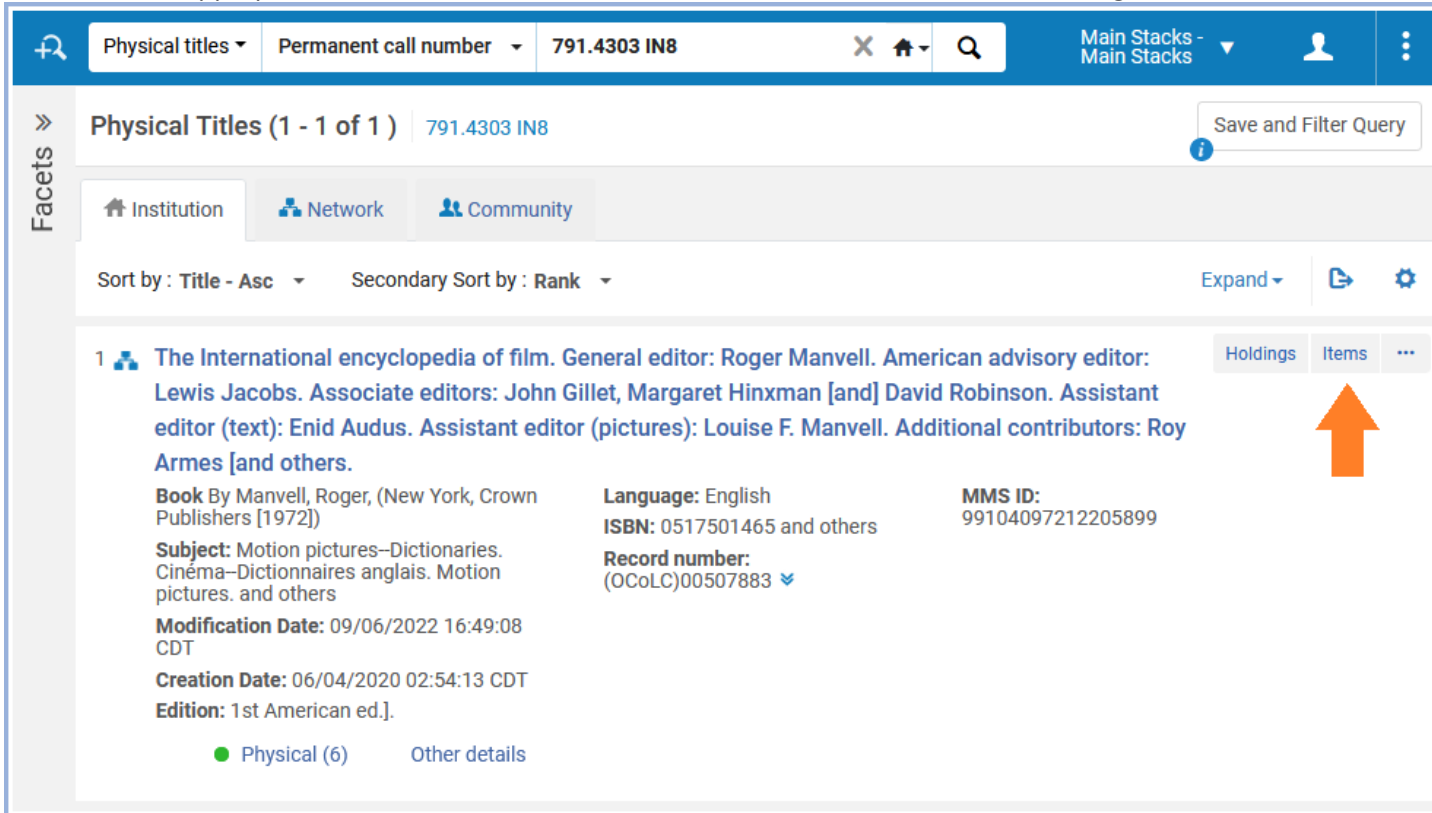   - Item in hand: If you have the item with you, the box should be checked.
    - Item on shelf: If the item still needs to be retrieved, make sure the box is unchecked.
- Add a note about what needs to be done with the item.
- If needed, select the Managing Department from the drop-down menu.
- Click "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.
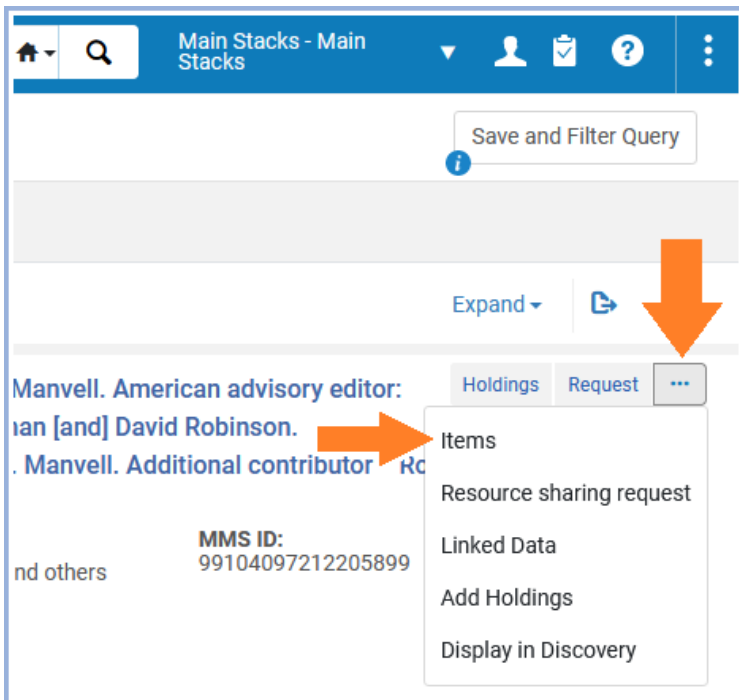
Detailed Workflow:

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.
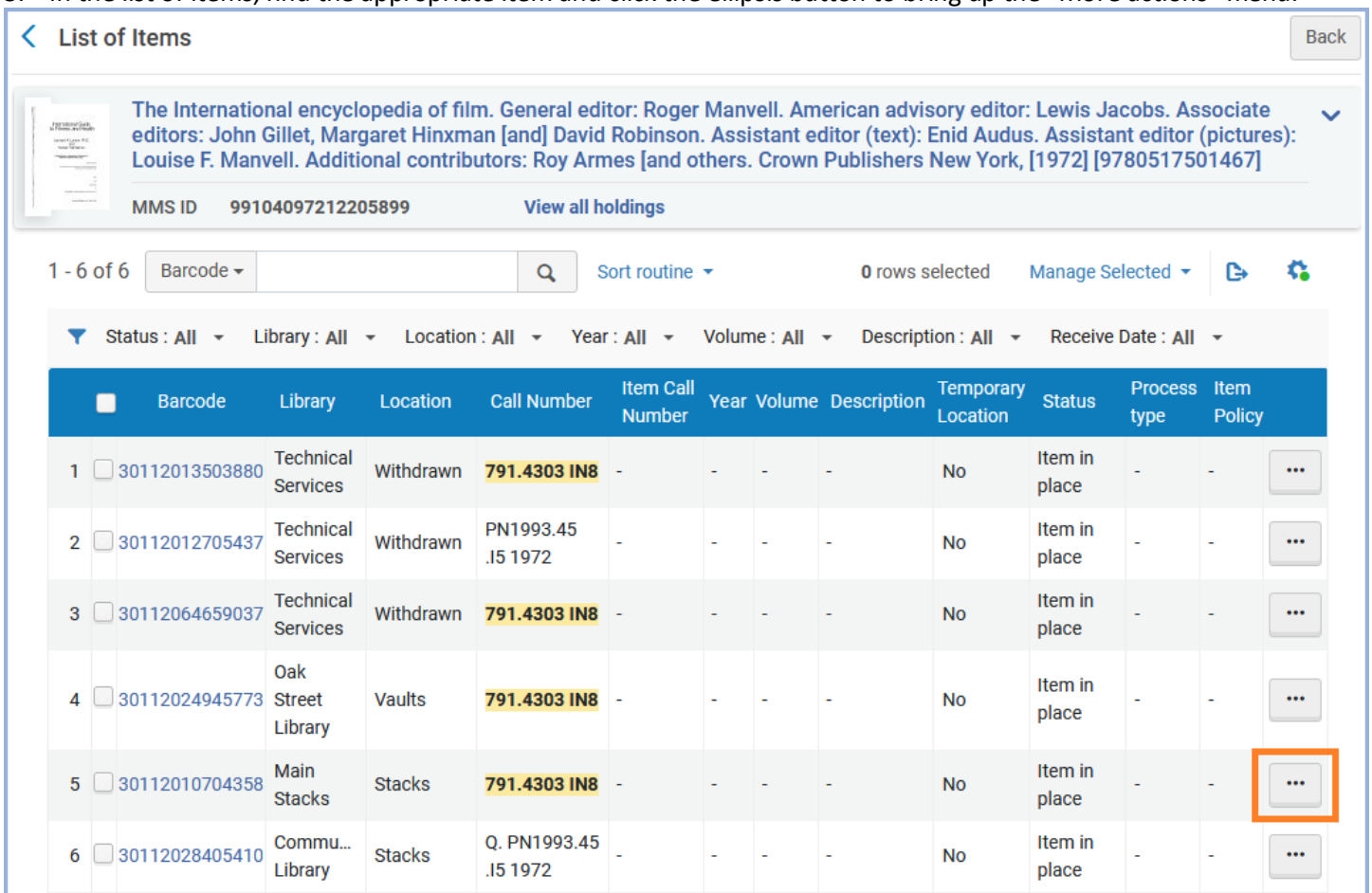

2. Locate the appropriate record in the list of results, then click the "Items" button on the right side.

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.

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

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.
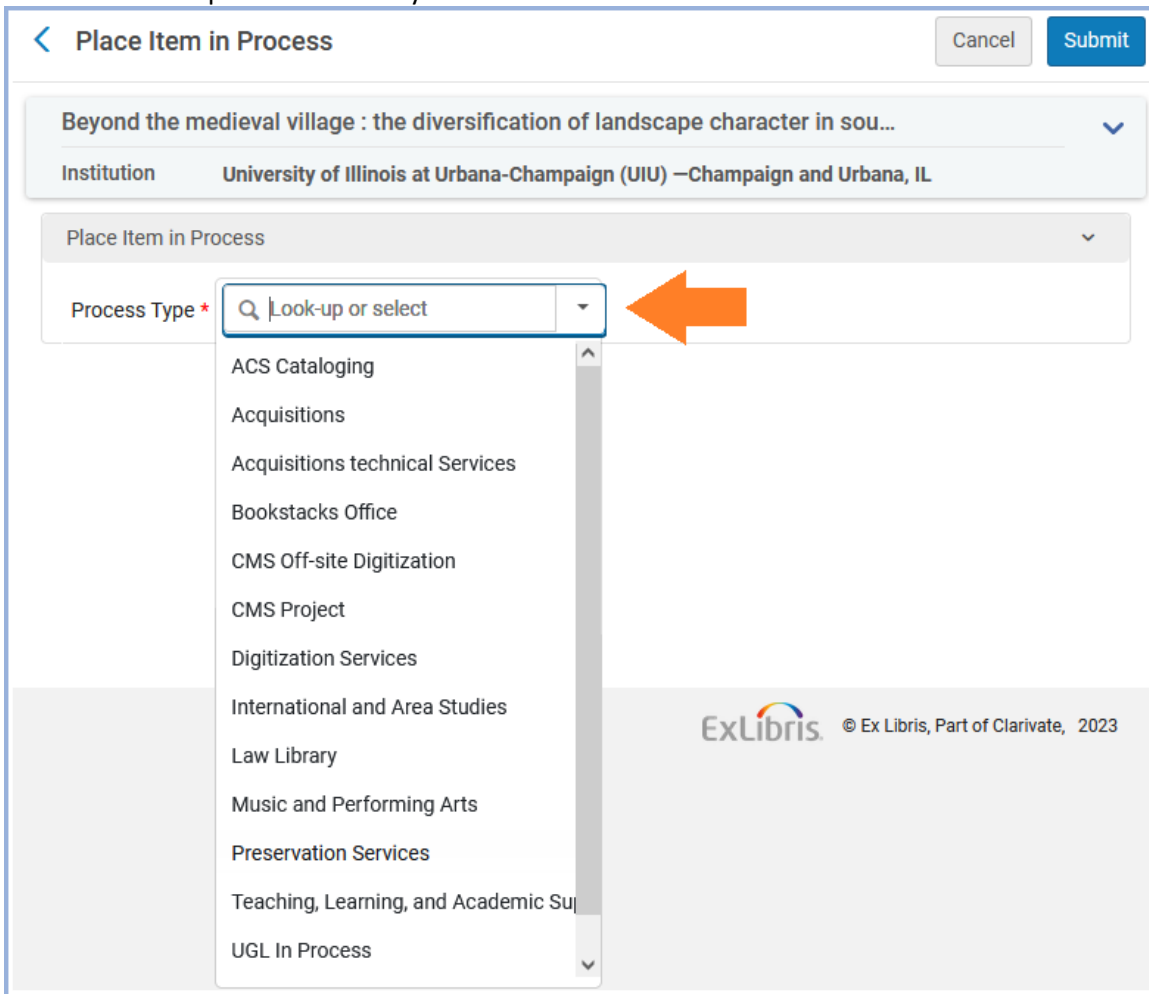
Basic Steps:
- First, process the item to either put it on the Hold Shelf, route it to a different Hold Shelf, or check it out to the patron.
- Next, search for the item in Alma. Open the "Place Item in Process" screen by clicking the "…" menu for that specific item and selecting "Work Order". (See above 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.
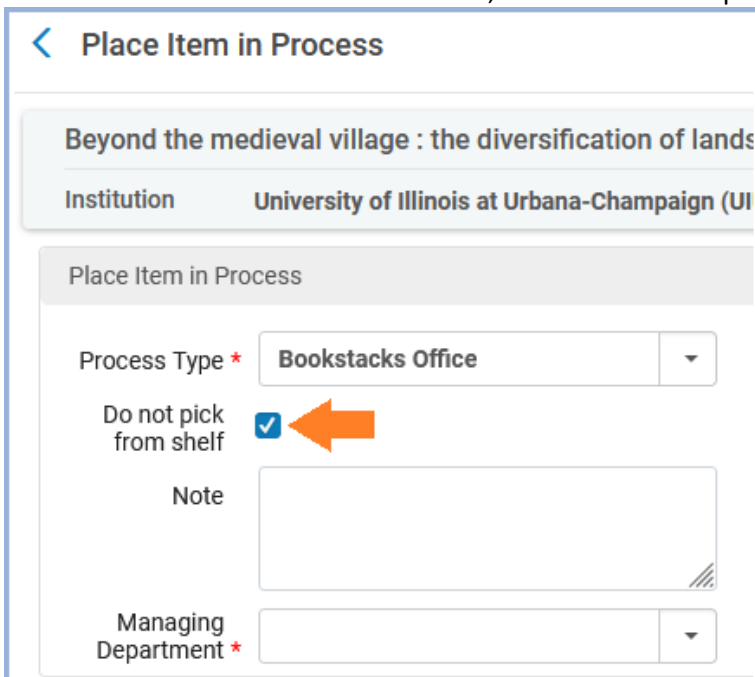
Detailed Workflow:
1. Start by processing the item:
   a. If it's being **put on hold for a patron**, follow the usual procedure until you have printed the Hold Shelf Slip (for items being put on your own Hold Shelf) or the Routing Slip (for items being sent to another library's Hold Shelf). Put the 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.

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

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

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.

7. Click the "Submit" button.

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.

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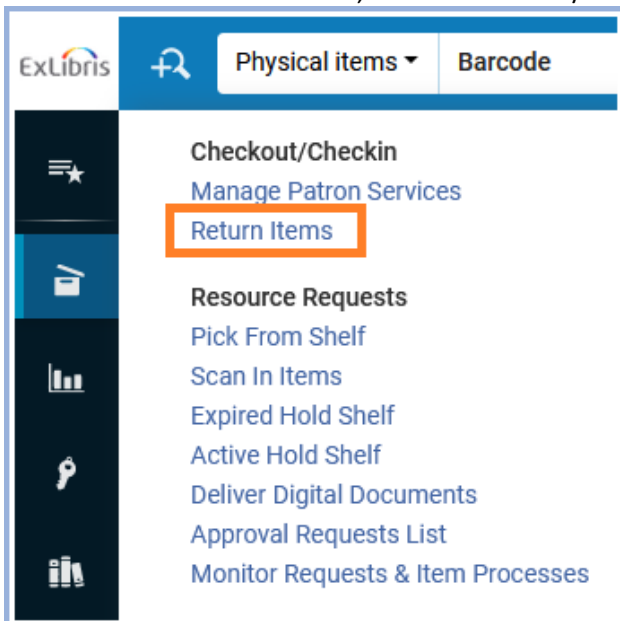
Note: If the returned item is from another departmental library, make a note of the information and notify that library instead of placing the Work Order yourself.

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.

   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.

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

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.

2. 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".

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

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.