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.
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.

7. Click the "Submit" button and send the item to the appropriate work department.
7. 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.
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.
2. Select "Work Order" from the drop down menu.
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.

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

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.

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.
The items destination is: Preservation Services

Item is requested
2. Select "Work Order" from the drop down menu.

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.

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
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.