Pop-up Collections

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Introduction

These instructions are for libraries who would like to highlight specific items from the University Library’s collection on a display.

Note: In order to use these instructions, the requesting library will need a work order department. They will also need to identify which location to use as the display location.
Placing Work Orders

Note: For more detailed instructions, see the “Placing a Work Order” documentation at https://www.library.illinois.edu/staff/alma/.

Basic Steps

- Search for the item in the Persistent Search Box.
  Note: If you used the “Physical Titles” parameter, click the “Items” button (or click the “…” button and select “Items” from the drop-down menu) to get to the list of items.
- Click the “…button next to the specific item. Select “Work Order” from the drop-down menu.
- Select the appropriate department to send the item to (typically your own department).
- Check or uncheck the “Do not pick from shelf” checkbox, as appropriate:
  o Item in hand: If you have the item with you, the box should be checked.
  o Item on shelf: If the item still needs to be retrieved, make sure the box is unchecked.
- Add a note about the pop-up collection.
- If it didn’t automatically populate, select the Managing Department from the drop-down menu.
- Click “Submit”.
- Repeat this process for each item that will be in the pop-up collection. If you want multiple volumes from a series in the collection, place a Work Order on each volume.

Detailed Workflow

1. Search for the item using the Persistent Search Box at the top of the screen in Alma, and then open the “Place Item in Process” screen. The procedure for this is different depending on if you’re using “Physical Titles” or “Physical Items” as the first parameter.
   a. For the “Physical Titles” parameter, find the appropriate search result and click the “Items” button. (If it’s not visible, click the “…” button and select “Items” from the drop-down menu.)
      i. Next, find the appropriate item in the list and click the “…” button. Select “Work Order” from the drop-down menu.
   b. For the “Physical Items” parameter, find the appropriate search result and click the “…” button on the item’s record. Select “Work Order” from the drop-down menu.
2. From the “Place Item in Process” screen, in the “Process Type” field, select the department where you want the item to go for the pop-up collection. This will usually be your own department.

3. 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.

4. Add a note about the pop-up collection in the “Note” field.

5. 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.

6. Click the “Submit” button near the top.

7. Repeat this process for each item that will be in the pop-up collection. If you want multiple volumes from a series in the collection, place a Work Order on each volume you want. The items will be retrieved from the owning library and shipped to your department.
Checking the Item into a Work Order Department

Once the item has been retrieved, it needs to be checked into your library’s Work Order Department. It should also be assigned a status to indicate what stage it’s at. This makes it easier to locate, especially if it’s not going on display immediately.

Basic steps
- From the Work Order Department location for your library, go to the “Scan In Items” screen.
- Use the following settings:
  - Set Status To: [The appropriate status for the stage the item is in]
  - Done: No
- Scan in the item barcode.

Detailed Workflow
1. Check that your location in Alma is the Work Order Department location for your library.
2. Go to the “Scan In Items” screen.
3. Use the drop-down menu for “Set Status To” to select the appropriate status.

4. The “Done” radio button should be set to “No”.

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No records were found.
5. Scan in the item barcode.

6. The Destination should start with “Manage Locally”.

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<tr>
<th>Title</th>
<th>Destination</th>
<th>Barcode</th>
<th>Request/Process Type</th>
<th>Requester ID</th>
<th>Place in Queue</th>
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<td>African theatre in performance: a festschrift in honour of Martin Banham / edited by Dele Layiwola</td>
<td>Manage Locally (Teaching, Learning, and Academic Support Work Orde)</td>
<td>301120..</td>
<td>Teaching, Learning, and Academic Support Work Orde</td>
<td>-</td>
<td>1</td>
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</tbody>
</table>
Removing the Work Order

Before the item can be put into the pop-up display, the Work Order must be removed.

Basic Steps

- From the Work Order Department location for your library, go to the “Scan In Items” screen.
- Use the following settings:
  - Set Status To: [Any status]
  - Done: Yes
- Scan in the item barcode.

Detailed Workflow

1. Check that your location in Alma is the Work Order Department location for your library.
2. Go to the “Scan In Items” screen.
3. The “Set Status To” field can be set to any status.
4. The “Done” radio button should be set to “Yes”.
5. Scan in the item barcode.

6. The Destination should be the owning library, and the Request/Process Type should be “Transit for Reshelving”.

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<th>Title</th>
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<th>Request/Process Type</th>
<th>Requester ID</th>
<th>Place in Checked Queue</th>
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<tbody>
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<td>Main Stacks</td>
<td>301120...</td>
<td>Transit For Reshelving</td>
<td>-</td>
<td>1</td>
</tr>
</tbody>
</table>
Changing the Item Location

Now that the Work Order has been removed, you can change the item's temporary location to your pop-up collection so the item can be put on display.

Basic Steps

• From the circulation desk location for your library, go to the “Scan In Items” screen.
• Select the “Change Item Information” tab.
• Use the following settings:
  o Change Type Field: Temporary
  o Location: [The location your library uses for pop-up collections]
  o Check Requests: Checked
• Scan in the item barcode.

Detailed Workflow

1. Make sure that your location in Alma is the circulation desk location for your library. If you’re still in the Work Order Department location, you’ll add additional Work Orders to the item that will need to be cleared.
2. Go to the “Scan In Items” screen.
3. Select the “Change Item Information” tab.

4. For the “Change Type” field, select “Temporary”.
5. Select a temporary location for the item. If you don’t have a location listed that includes the term “Pop-Up Collection” or something similar, then check with a supervisor to see which location you should use instead.
6. The “Check Requests” checkbox should have a checkmark.
7. Scan in the item barcode.
8. The Destination should be “Reshelve”, and the Location should be the temporary location you selected earlier.

9. Put the item out on display in the pop-up collection. It can now be checked out to patrons and checked back in to the pop-up collection as normal.
Returning the Item to its Original Location

Once the pop-up collection is over, the items need to have their original location restored in Alma so they can be routed back to the owning library.

Basic Steps

- From the circulation desk location for your library, go to the “Scan In Items” screen.
- Select the “Change Item Information” tab.
- Use the following settings:
  - Change Type Field: Restore
  - Check Requests: Checked
- Scan in the item barcode.
- Print the Routing Slip, put it in the item, and send the item to the owning library via Shipping.

Detailed Workflow

1. Make sure that your location in Alma is the circulation desk location for your library.
2. Go to the “Scan In Items” screen.
3. Select the “Change Item Information” tab.
4. For the “Change Type” field, select “Restore”.

5. The “Check Requests” checkbox should have a checkmark.
6. Scan in the item barcode.
7. Alma will print a Routing Slip. Put the slip in the item.
8. The Destination should be the library where the item came from.

9. Follow your usual procedure to send the item there through Shipping.