

Work Orders in Alma

November 18, 2021

Requests

Official definitions

“A resource request (or just "request") is for the acquisition, manipulation, movement, or processing of inventory.”

- [Requests in Alma](#)

“A request to make a library resource available at a specific location for a specific purpose.”

- [Alma glossary](#)

Requests

Who

Who can place requests?

- Patrons
- Staff
- Alma itself

Requests

Where

Where can requests be placed?

- Alma
 - Manually
 - Job
- Primo VE

Requests

Categories

- Booking
- General Hold
- Purchase
- Resource Sharing
 - Borrowing
 - Lending
- Restore
- Ship
- Transit for Reshelving
- Work Order
 - Acquisition Technical Services
 - Digitization

Work Orders

Definitions

“An internal library request to route physical materials for internal processing. A work order sends an item to a work order department (marking it as not available on the shelf), where it can be managed according to internal statuses.”

- [Alma glossary](#)

“...staff-initiated requests for internal processing of physical items.”

- [Harvard wiki – Work Orders Overview](#)

Work Orders

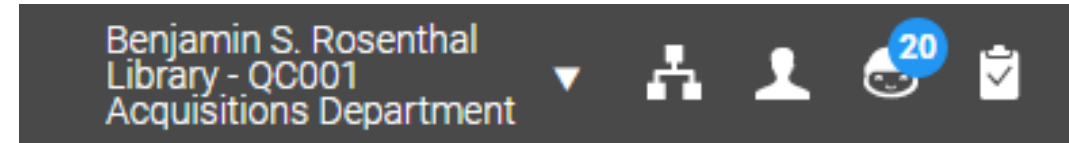
Components

- Work Order Type (aka Process Type): a workflow consisting of one or more steps
 - E.g. Acquisition technical services
- Work Order Status: a step within a Work Order
 - E.g. At Bindery, Copy Cataloging, etc.
- Work Order Department: physical location where the work occurs
 - E.g. Acquisitions Department

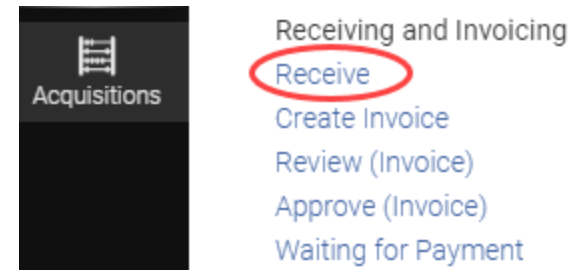
Acquisition Technical Services Work Order

Instructions

1. Set your location to the Acquisitions Department



2. Go to Acquisitions → Receiving and Invoicing → Receive



Acquisition Technical Services Work Order

Instructions

3. You can choose one, both, or none of the options:

Receive New Material

Keep in
Department ☐

Shelf Ready ☐

Acquisition Technical Services Work Order

Instructions

If you select none of the options, the item will be temporarily *awaiting reshelving* after you receive it. No work order will be created

6 capricci : per violino / Salvatore Sciarrino. [Edit](#)

Music {Notated music - Physical} notated music; unmediated; volume By Sciarrino, Salvatore. (Milano : Ricordi, ©1976.)

Language: English

Record number: (OCoLC)931422697

Orders: 1

MMS ID: 990093793150106137

Subject: Violin music--Scores.

Creation Date: 07/05/2020 10:25:11 EDT

Modification Date: 10/29/2020 10:35:35 EDT

● Physical (1)

1 Holdings | 1 of 1 items are available

Library	Location	Call Number	Accession Number	Item Availability
QCMUS	MSCO	-	-	● 1 of 1 Available (awaiting reshelving until 11/16/2021 15:03:00 EST)

Acquisition Technical Services Work Order

Instructions

If you select *Shelf Ready*, you will be able to search by barcode

[<](#) Receive New Material

Keep in
Department ☐

Shelf Ready ☒



Go

Acquisition Technical Services Work Order

Instructions

4. Select *Keep in Department*, then choose a Work Order Status

< Receive New Material

Keep in Department ☒

One Time ☐ Con ☐

1 - 20 of 77

Status : In ☐

Look-up or select

- At Bindery
- Cataloging
- Repair
- Review Shelf
- Waiting Shelf

Acquisition Technical Services Work Order

Instructions

5. Receive the item (if you only have one)

[← Receive New Material](#) Receive all Receive

Keep in Department ☒ At Bindery Shelf Ready ☐ Received Date 11/18/2021

One Time Continuous

1 - 20 of 73 All Filter by vendor Filter by owning library

Status : In Review Locate : PO Lines Filter orders with interested users : No Filter orders with patron requests : No Clear all

#	Item description	Status	Locations	# Ordered	Items Received	Date Sent	Next Step	Rush	Notes	Receiving note	Interested Users
1.. <input type="checkbox"/> 9420029-1	Cell and molecular biology / Nalini Chandar, Susan Viselli., Philadelphia :, Wolters Kluwer,, 2019, 9781496348500, ISBN	Sent	Benjamin S. Rosenthal Library - Stacks Level 5 (1)	1	0	03/19/2020	-		✓	-	
	Charity and Sylvia : a										

Manage Items
Receive

Acquisition Technical Services Work Order

Instructions

5.
Alternatively,
you can
receive
multiple
items at
once

Receive New Material

Receive all

Receive

Keep in Department ☒ At Bindery

Shelf Ready ☐

Received Date 11/18/2021

One Time

Continuous

1 - 20 of 73

All

Filter by vendor

Filter by owning library

Status : In Review

Locate : PO Lines

Filter orders with interested users : No

Filter orders with patron requests : No

Clear all

#	Item description	Status	Locations	# Ordered	Items Received	Date Sent	Next Step	Rush	Notes	Receiving note	Interested Users
1. <input checked="" type="checkbox"/> 9420029-1	Cell and molecular biology / Nalini Chandar, Susan Viselli., Philadelphia ;, Wolters Kluwer,, 2019, 9781496348500, ISBN	Sent	Benjamin S. Rosenthal Library - Stacks Level 5 (1)	1	0	03/19/2020	-		✓	-	
2. <input checked="" type="checkbox"/> 9420835-1	Charity and Sylvia : a same-sex marriage in early America / Rachel Hope Cleves., New York ;, Oxford University Press,, 2014. O 10 022542 7	Sent	Benjamin S. Rosenthal Library - Stacks Level 4 (1)	1	0	04/17/2020	-		✓	-	

Acquisition Technical Services Work Order

Instructions


A request has been created and the item is not available

Cell and molecular biology / Nalini Chandar, Susan Viselli.

[Edit](#)

Book {Book - Physical} text; unmediated; volume By Chandar, Nalini, (Philadelphia : Wolters Kluwer, [2019])


Language: English

 **Orders:** 1

ISBN: 9781496348500 and others

Requests: 1

Subject: Cytology--Examinations, questions, etc. Cytology--Outlines, syllabi, etc. Molecular biology--Examinations, questions, etc. and others

Record number: on1011680436-01cuny_network 

MMS ID:
990094200290106137

Series: Lippincott's illustrated reviews.

Creation Date: 07/05/2020 10:48:48 EDT

Modification Date: 02/09/2021 04:05:13 EST

Edition: Second edition.



● Physical (1)

1 Holdings | 0 of 1 items are available

Library	Location	Call Number	Accession Number	Item Availability
QC001	STAC5	QH581.2 .C47 2019	-	● 1 Not Available

Acquisition Technical Services Work Order

Instructions

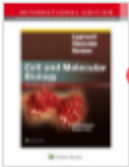
This is how it would look if you clicked the request on the previous image or if you navigated to Fulfillment → Resource Requests → Monitor Requests & Item Processes

Activity Status : Active

Include Pending Resource Sharing Requests : Yes

Clear all

1



Cell and molecular biology / Nalini Chandar, Susan Viselli.
Request Type: Acquisition technical services
ID: 2104680940006137
Creator: Administrator, Alma
Pickup Location: QC001 Acquisitions Department
Barcode: 31153007620446

Place in Queue: 0
Call Number: QH581.2 .C47 2019
Request Date: 11/18/2021
Material Type: Book

Workflow Step: In Process
Process Status: At Bindery
Managed By Department: QC001 Acquisitions Department
Process Date: 11/18/2021
Expiration Date: 11/25/2021

Cancel

Move To Task List

...

Acquisition Technical Services Work Order

Instructions

This is how it would look if you viewed the item record

Cell and molecular biology / Nalini Chandar, Susan Viselli.

Book By Chandar, Nalini, (Philadelphia : Wolters Kluwer, [2019])

Barcode: 31153007620446

Library: Benjamin S. Rosenthal Library

Creation Date: 03/18/2020 20:00:00 EDT

Modification Date: 11/18/2021 13:12:35 EST

Process type: Acquisition technical services (Bindery)

Expected Arrival Time: -

At: QC001 Acquisitions Department

On Hold Expiration Date: -

Due Date: -

Needed By: -

Until: 11/25/2021

Permanent Location: Stacks Level 5

Call Number: QH581.2 .C47 2019

Call Number Type: Library of Congress classification

Status: Item not in place

Due back: -

Item Policy: Regular Loan

Material Type: Book

 **Orders:** 1

Requests: 1

Item ID:
2349107730006137

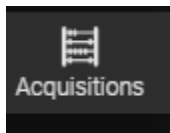
Holdings ID:
2249107740006137

MMS ID:
990094200290106137

Acquisition Technical Services Work Order

Instructions

7. Go to Acquisitions → Post-Receiving Processing → Receiving Department Items



Post-Receiving Processing

Receiving Department Items

Scan In Items

Acquisition Technical Services Work Order

Instructions

8. Change the Work Order Status or mark it Done

In Process Items

Scan In Items

1 - 4 of 4

Title ▾



0 rows selected

Generate Barcode

Done

Change Status ▾



Process Status : All ▾ Request Filter : All ▾ Library : All ▾ Interested Users : All ▾

<input type="checkbox"/>	▲ Title	Identifier	Barcode	↕ Status	↕ End of Activity	Modified By	Modifici Date	Requests	Noti	Interested Users	Library	
1 <input type="checkbox"/>	Cell and molecular biology / Nalini Chandar, Susan Viselli.	9781496348500	311530076...	At Bindery	1. 11/25/...	admin	11/1...	No requests			Benjamin S. Rosenthal Library	...
2 <input type="checkbox"/>	Charity and Sylvia : a same-sex marriage in early America / Rachel Hope Cleves.	0-19-933542-7	9420835-10	At Bindery	1. 11/25/...	admin	11/1...	No requests				

Edit Inventory item
Edit
Done

Acquisition Technical Services Work Order

Instructions

8. Another way to do this is at Acquisitions → Post-Receiving Processing → Scan In Items

Scan In Items

Scan in Items

Change Item Information

Automatically print slip ☐ Yes ☒ No

Set Status To

At Bindery

Done ☒ Yes ☐ No

Scan item barcode *

OK

Scan request ID

OK

Acquisition Technical Services Work Order

Instructions

Now the item is temporarily *awaiting reshelving*, just like if you had never created a work order

Cell and molecular biology / Nalini Chandar, Susan Viselli.

[Edit Record](#)

Book {Book - Physical} text; unmediated; volume By Chandar, Nalini, (Philadelphia : Wolters Kluwer, [2019])

Language: English

 **Orders:** 1

Subject: Cytology--Examinations, questions, etc. Cytology--Outlines, syllabi, etc. Molecular biology--Examinations, questions, etc. and others

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Series: Lippincott's illustrated reviews.

Creation Date: 07/05/2020 10:48:48 EDT

Modification Date: 02/09/2021 04:05:13 EST

Edition: Second edition.



● Physical (1)

1 Holdings | 1 of 1 items are available

Library	Location	Call Number	Accession Number	Item Availability	Related F
QC001	STAC5	QH581.2 .C47 2019	-	● 1 of 1 Available (awaiting reshelving until 11/18/2021 14:29:00 EST)	

Work Orders

Other Uses

- More granular versions of the statuses in Acquisitions Technical Services
 - E.g. A bindery work order with work order statuses for binding, sewing, etc.
 - E.g. A cataloging work order with work order statuses for original cataloging, classification, etc.
- Digitization workflows
- Weeding workflows

Questions?

For additional assistance, please contact Kristen Fredericksen at kristen.fredericksen@cuny.edu