

The Mending Work Order Workflow

By Gordon Xu (Sept 2nd 2020)

Create a Work Order

1. To place a work order, look up an item by barcode or call number, and click on Ellipse, then choose "Work Order".

The screenshot shows the Alma library system interface. At the top, there's a navigation bar with tabs like Acquisitions, Resources, Discovery, Fulfillment, Admin, and Analytics. Below this, a search bar shows 'Physical Items' with a dropdown for 'Barcode' and the value '31854007427670'. The search results show 'Physical Items (1 - 1 of 1)' for the same barcode. On the left, there's a 'Facets' sidebar. The main content area shows details for the item 'American men & women of science cumulative index / compiled by Jaques Cattell Press.' with various metadata like 'Book By Jaques Cattell Press. (New York : Bowker, 1983.)', 'Barcode: 31854007427670', 'Library: NMU Olson Library', 'Creation Date: 04/28/2020 10:14:40 EDT', 'Modification Date: 09/03/2020 21:01:42 EDT', 'Expected Arrival Time: -', 'On Hold Expiration Date: -', 'Due Date: -', 'Needed By: -', 'Until: -', and 'Permanent Location: NMU Books (3rd floor)'. On the right, there's a 'Call Number: Q141 .A47 Index', 'Call Number Type: Library of Congress classification', 'Status: Item in place', 'Due back: -', 'Item Policy: Regular', and 'Material Type: Book'. Further right, there are IDs: 'Item ID: 2348577890006216', 'Holdings ID: 2290899570006216', and 'MMS ID: 995361053406216'. A red arrow points to the 'Work Order' option in the 'Edit Item' dropdown menu.

2. Choose "Process Type" and hit "Submit".

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Physical items ▾ Barcode ▾

Place Item in Process

American men & women of science cumulative index / compiled by Jaq... ▾

Institution Northern Michigan University

Place Item in Process ▾

Process Type *

Acquisition technical services

Mending Work Order

Cancel **Submit**

3. If you have the item in hand, check the "Do not pick from shelf" box; otherwise the item will show up on a Pick from Shelf List. Select "Managing Department", fill in "Note" field if needed, and hit "Submit".

Physical items ▾ Barcode ▾

Place Item in Process

American men & women of science cumulative index / compiled by Jaq... ▾

Institution Northern Michigan University

Place Item in Process ▾

Process Type * **Mending Work Order**

Do not pick from shelf ☒

Note

Managing Department * **NMU C&M Mending**

Cancel **Submit**

If you have an item in hand, check the "Do not pick from shelf" box; otherwise the item will show up on a Pick from Shelf list.

The Mending Work Order Workflow

Now you will see the item has been placed into a work order. The item location changes to work order managing department, and the status changes to "Item not in place".

The screenshot displays the Alma library system interface. At the top, the navigation bar includes links for Acquisitions, Resources, Discovery, Fulfillment, Admin, and Analytics. The main header shows the item type as 'Physical items' and the barcode as '31854007427670'. A notification bubble on the right states: 'The request was successfully submitted : request id = 1138219460006216'. The item record for 'American men & women of science cumulative index / compiled by Jaques Cattell Press.' is shown. Key details include: Book By Jaques Cattell Press. (New York : Bowker, 1983.), Barcode: 31854007427670, Library: NMU Olson Library, Creation Date: 04/28/2020 10:14:40 EDT, Modification Date: 09/03/2020 21:22:01 EDT, Process type: Mending Work Order, Expected Arrival Time: -, At: NMU C&M Mending, On Hold Expiration Date: -, Due Date: -, Needed By: -, Until: 09/08/2020, Permanent Location: NMU Books (3rd floor). The item's status is 'Item not in place' and its material type is 'Book'. A red arrow points to the 'Requests: 1' section, and a red box highlights the text 'An item has been placed into a work order'.

Manage a Work Order

1. Connect to the managing department (e.g. the NMU C&M Mending).

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The screenshot shows the Alma library system interface. The top navigation bar includes links for Acquisitions, Resources, Discovery, Fulfillment, Admin, and Analytics. A dropdown menu is open for 'Physical items', showing 'Barcode' and 'NLM Olson Library - NLM C&M Mending'. Below the navigation bar, there is a welcome message for 'Xu, Gordon' and a date '09/03/2020'. A notification banner at the top states: 'Please be advised that Ex Libris will deploy a new release on your Alma production environment from 09/06/2020 03:00:00 EDT to 09/06/2020 04:00:00 EDT. Please view the release notes by clicking here for more information about the exciting new features and enhancements in this release. During this period, access to Alma may be unavailable, so please take this into account in your schedule. We apologize for any inconvenience this may cause.' Below the notification, there are sections for 'Recent Pages', 'Tasks', 'Notifications', and 'Organization Calendar'. The 'Tasks' section lists 'DARA Recommendations', 'Order Lines', 'Items', and 'Reading Lists'. The 'Notifications' section is empty. The 'Organization Calendar' shows a calendar for September 3-6, 2020, with a 'GuideMe' button.

2. Click on Monitor Requests & Item Processes (Fulfillment > Monitor Requests & Item Processes).

The screenshot shows the Alma library system interface with the 'Fulfillment' menu open. The menu options include: Resource Requests, Scan In Items, Manage In Process Items, Approval Requests List, Monitor Requests & Item Processes (highlighted with a red box), Course Reserves, Courses, Reading Lists, Citations, PPU Licensing, PPU Licenses, Transactions, Search Resource, Reports, Renew PPU Licenses, Advanced Tools, Fulfillment Configuration Utility, Create Fulfillment Sets, Bulk Change Due Dates, View Restore Request Jobs, View Overdue and Lost Loan Jobs, Items Requiring Action, Transfer requests, Create Fines And Fees Report, Process and Enrich Citations, Resend Printouts/Emails, Citation Alternate Suggestions, and Loans Overdue Notification Status Update. The 'Monitor Requests & Item Processes' option is highlighted with a red box. Below the menu, there is a search bar and a 'GuideMe' button.

The Mending Work Order Workflow

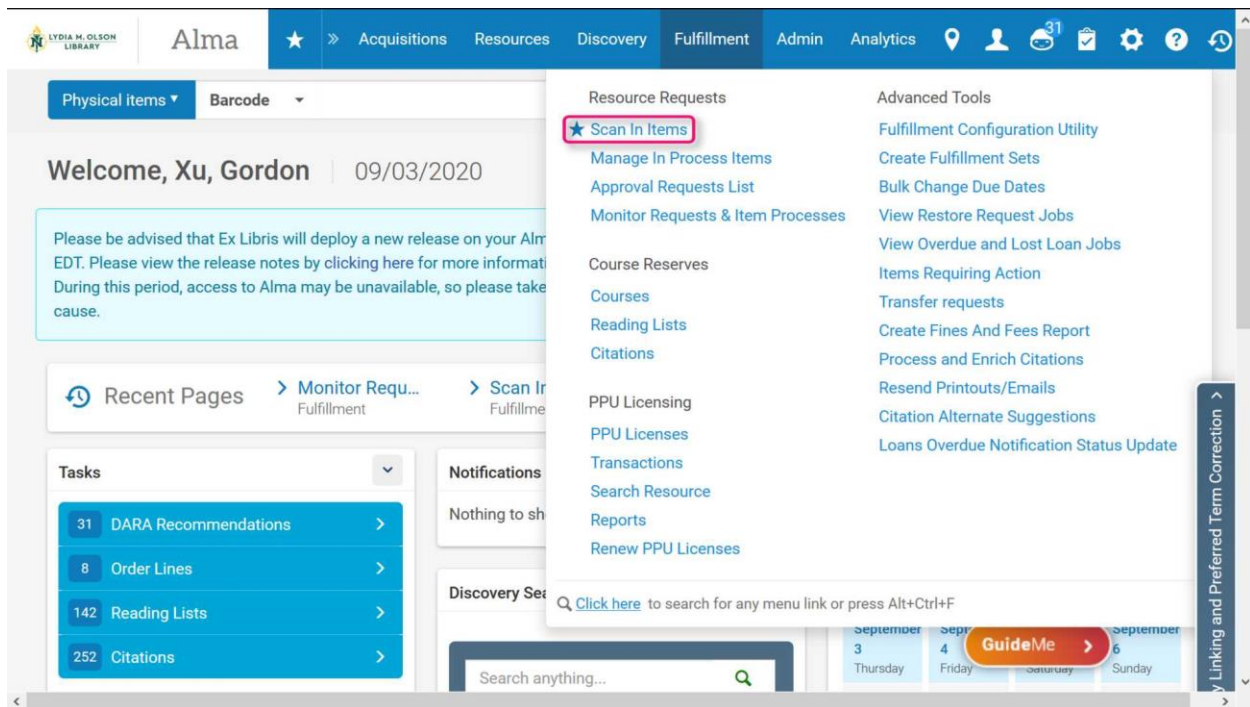
3. Click on Mending Work Order under the Facets. You will see all items with Pickup Location: NMU C&M Mending. Pick one item you'd like to work on.

The screenshot shows the Alma library system interface. The top navigation bar includes links for Acquisitions, Resources, Discovery, Fulfillment, Admin, and Analytics. The left sidebar contains a 'Facets' menu with the following options: Type (Request (10), In Process (16)), Material Type, Workflow Step (Pickup From Shelf (2), On Hold Shelf (5), Transit Item (13), Undefined (5), In Process (1)), Request Date (Today (2), Up to three days ago (2), Up to a week ago (16)), and Mending Work Order (16). The 'Mending Work Order' option is highlighted with a red box. The main area displays a list of items with details for two items.

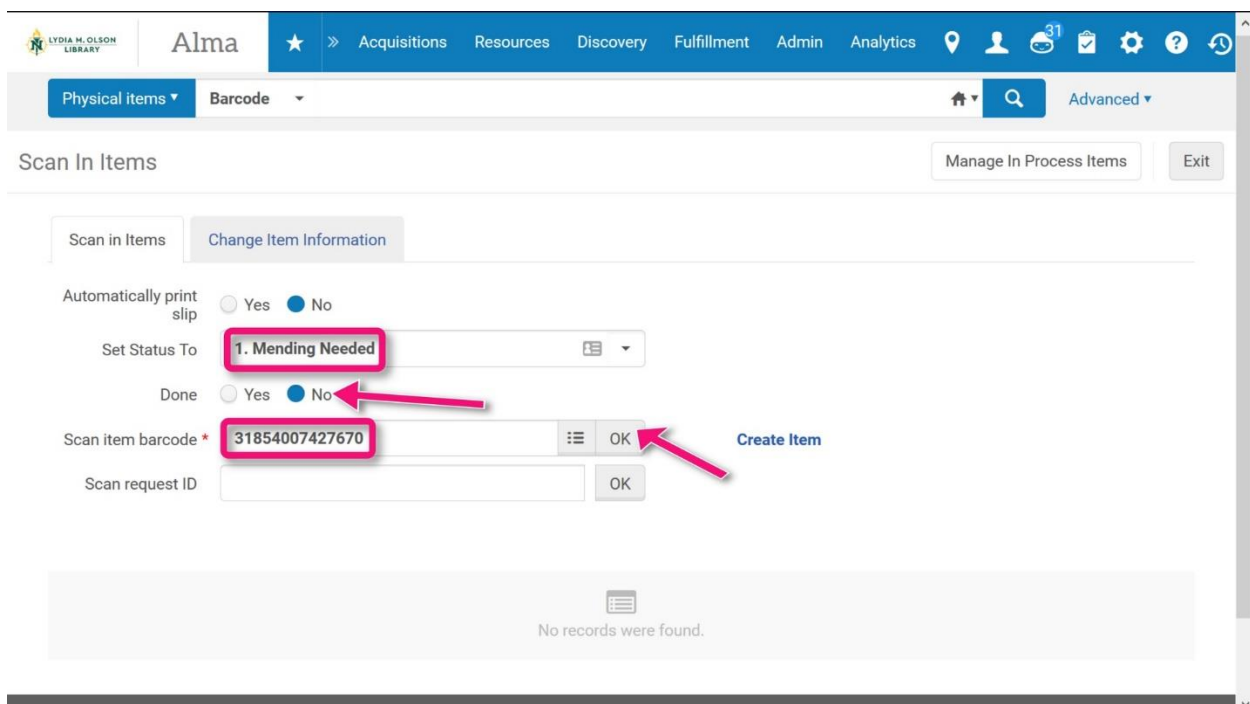
Item	Type	Place in Queue	Call Number	Request Date	Date Needed By	Workflow Step	Process Status	Managed By Library	Managed By Desk
ase research designs : methods for clinical and applied settings / Alan E. Kazdin.	Patron physical item request	1	BF76.6.S56 K39 2011	08/14/2020	08/14/2020				
of the theatre / Oscar G. Brockett, Franklin J. Hildy.	Patron physical item request	0	PN2101 .B68 2008		08/24/2020	On Hold Shelf	In Process	NMU Olson Library	NMU Circ Desk

4. Click on Scan In.

The Mending Work Order Workflow



5. Define the Status (e.g. set status to "Mending Needed"), select "Done" to "No", which means you just start working on and the item is not complete and remains in its current stage in the workflow, scan item barcode, and hit "OK".



The Mending Work Order Workflow

Now the item will be In Transit to work order managing department (e.g. the NMU C&M Mending).

1 - 1 of 1

Title	Destination	Barcode	Request/Process Type	Requester	Requester ID	Place in Queue	Checked In
1 American men & women of science cumulative index / compiled by Jaques Cattell Press.	Manage Locally (Mending Work Order)	31854007427...	Mending Work Order	-	-	1	...

After scan in, the item will be In Transit to work order managing department

6. When the mending work is done, click on Scan In (see step 4 in the section of "Manage a Work Order"). This time, select "Done" to "Yes", which means the item is complete and proceeds to the next stage in the workflow, scan item barcode, and hit "OK" (At this step, you don't need to set status).

The Mending Work Order Workflow

Physical items Barcode

Scan In Items Manage In Process Items Exit

Scan in Items Change Item Information

Automatically print slip ☐ Yes ☒ No

Set Status To 1. Mending Needed

Done ☒ Yes ☐ No

Scan item barcode * 31854007427670 OK

Scan request ID OK

Create Item

No records were found.

Once the managing department marks an item "Done", it shows up as In Transit for reshelving to the home library.

Scan In Items Clear List Manage In Process Items Exit

Scan in Items Change Item Information

Automatically print slip ☐ Yes ☒ No

Set Status To 1. Mending Needed

Done ☒ Yes ☐ No

Scan item barcode * Look-up or select OK

Scan request ID OK

Create Item

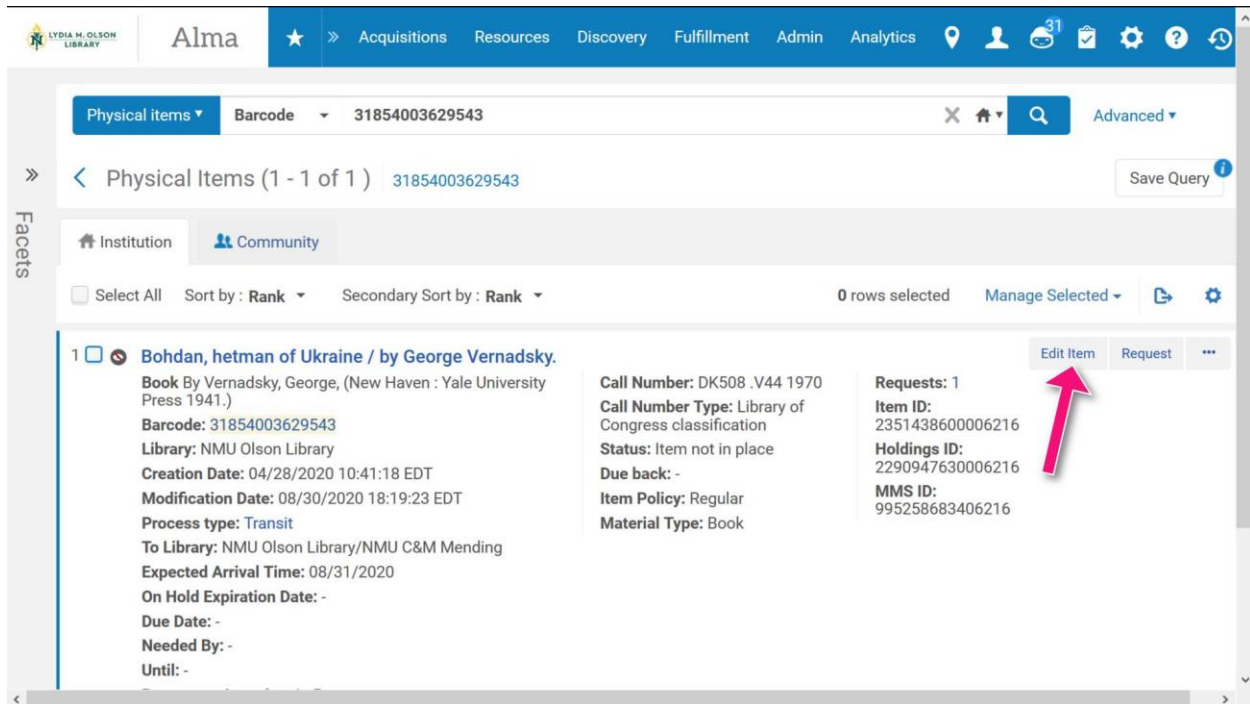
1 - 1 of 1

Title	Destination	Barcode	Request/Process Type	Requester	Requester ID	Place in Queue	Checked In
American men & women of science cumulative index / compiled by Jaques Cattell Press.	Reshelve to NMU Olson Library - NMU Books (3rd floor)	31854007427...	-	-	-	0	...

Once the managing department marks an item "Done", it shows up as In Transit for reshelving to the home library.

The Mending Work Order Workflow

7. Change the permanent location for an item when applicable (if not applicable, please skip the steps 7-9). To this end, search the item by barcode, and then click on "Edit Item".



Physical items Barcode 31854003629543

Physical Items (1 - 1 of 1) 31854003629543

Institution Community

Select All Sort by: Rank Secondary Sort by: Rank 0 rows selected Manage Selected

1 ☐ Bohdan, hetman of Ukraine / by George Vernadsky.

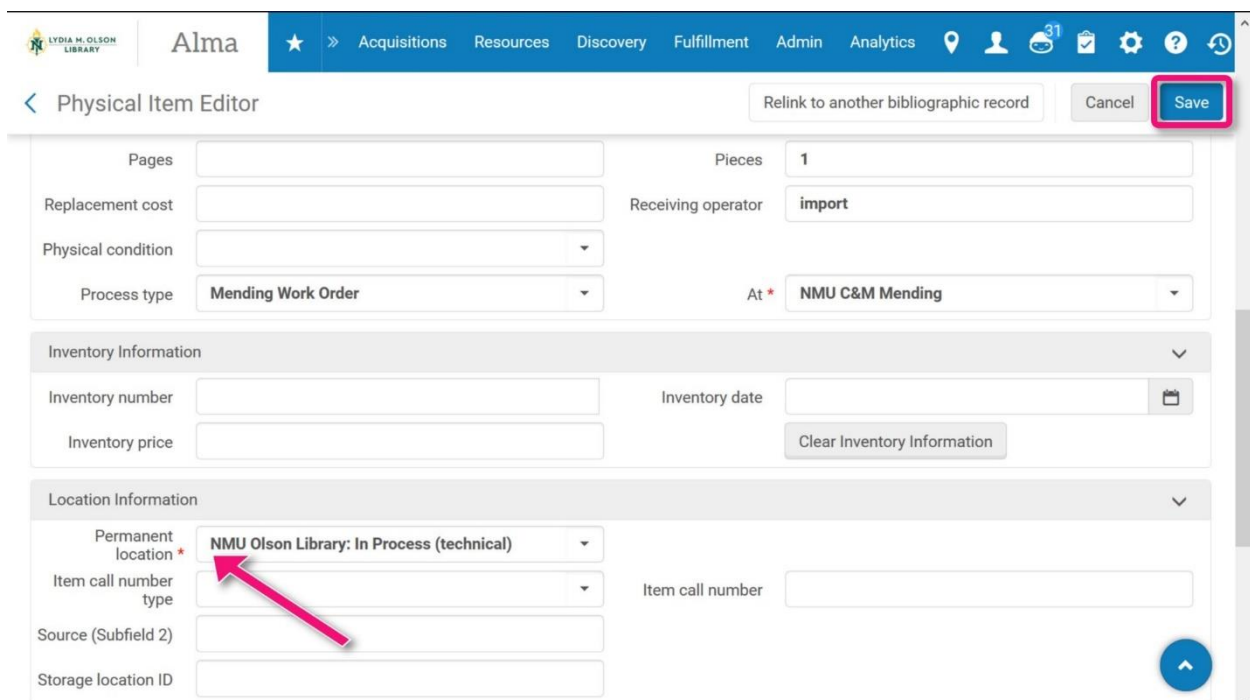
Book By Vernadsky, George, (New Haven : Yale University Press 1941.)
Barcode: 31854003629543
Library: NMU Olson Library
Creation Date: 04/28/2020 10:41:18 EDT
Modification Date: 08/30/2020 18:19:23 EDT
Process type: Transit
To Library: NMU Olson Library/NMU C&M Mending
Expected Arrival Time: 08/31/2020
On Hold Expiration Date: -
Due Date: -
Needed By: -
Until: -

Call Number: DK508 .V44 1970
Call Number Type: Library of Congress classification
Status: Item not in place
Due back: -
Item Policy: Regular
Material Type: Book

Requests: 1
Item ID: 2351438600006216
Holdings ID: 2290947630006216
MMS ID: 995258683406216

Edit Item Request

8. Select a desired permanent location in the Physical Item Editor, and hit "Save".



Physical Item Editor

Relink to another bibliographic record Cancel Save

Pages Pieces 1

Replacement cost Receiving operator import

Physical condition

Process type Mending Work Order At NMU C&M Mending

Inventory Information

Inventory number Inventory date

Inventory price Clear Inventory Information

Location Information

Permanent location NMU Olson Library: In Process (technical)

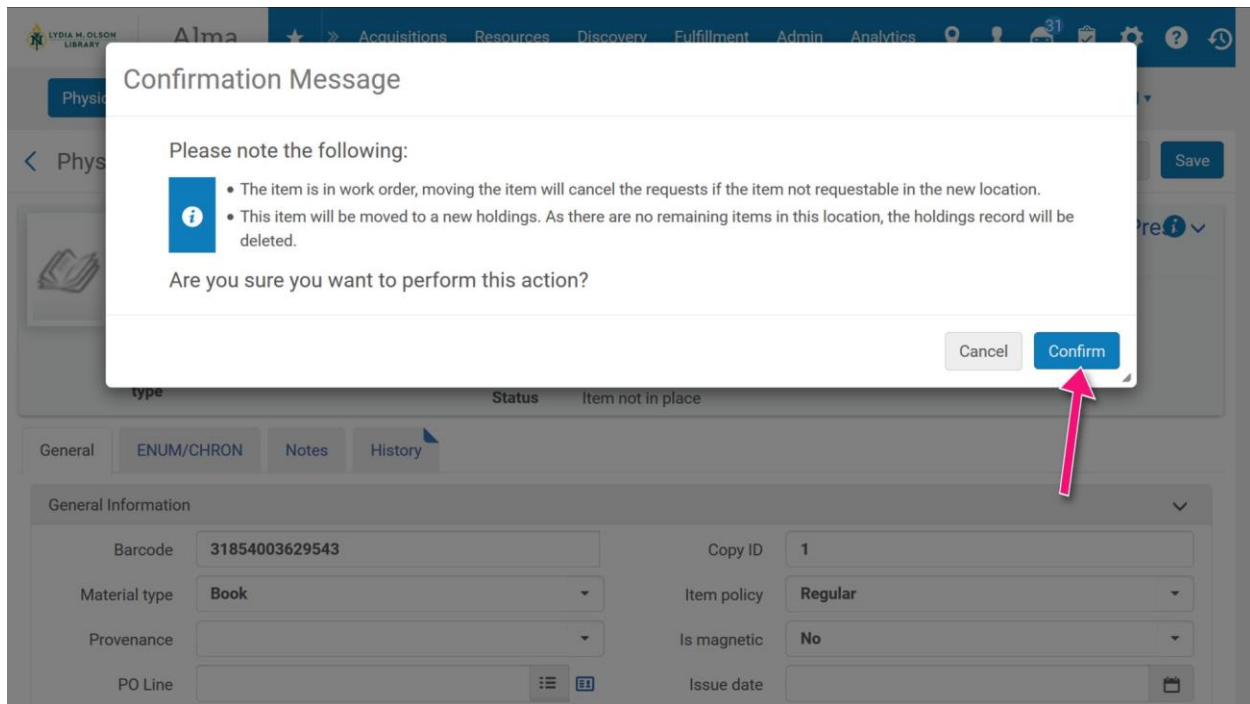
Item call number type Item call number

Source (Subfield 2)

Storage location ID

The Mending Work Order Workflow

9. Alma might prompt you for a confirmation message "This item will be moved to a new holdings. As there are no remaining items in this location, the holdings record will be deleted. Are you sure you want to perform this action?" Hit "Confirm". Now the item has been moved to a new permanent location.



Complete a Work Order

Once the mending is done, the item will be In Transit back to the home library. Since we configured our Alma "Reshelve Without Transit" to avoid transit", the item is already ready for reshelving, we can skip this step.

1. Connect to Circulation Desk.

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2. Click on Scan In (see step 4 in the section of "Manage a Work Order"). Make sure "Register in-house use" and "Item from another institution" unchecked, scan item barcode, and hit "OK".

The Mending Work Order Workflow

Now, the item is back to its shelf, and ready for ready for patron use. The work order is complete.

The screenshot displays the Alma library system interface. At the top, the navigation bar includes links for Acquisitions, Resources, Discovery, Fulfillment, Admin, and Analytics. The main header shows the library name 'LYDIA M. OLSON LIBRARY' and the Alma logo. Below the header, a search bar contains the barcode '31854007427670'. The search results show 'Physical Items (1 - 1 of 1)' for the same barcode. The left sidebar has a 'Facets' section. The main content area displays the item details for 'American men & women of science cumulative index / compiled by Jaques Cattell Press.' The details are organized into three columns: General Information, Call Number, and Item ID/Holdings ID/MMS ID. The 'Status: Item in place' is highlighted with a red box. The 'Permanent Location' is listed as 'NMU Books (3rd floor)'. The bottom of the interface shows a 'Save Query' button and a '0 rows selected' message.

General Information	Call Number	Item ID/Holdings ID/MMS ID
Book By Jaques Cattell Press. (New York : Bowker, 1983.) Barcode: 31854007427670 Library: NMU Olson Library Creation Date: 04/28/2020 10:14:40 EDT Modification Date: 09/03/2020 22:54:41 EDT Expected Arrival Time: - On Hold Expiration Date: - Due Date: - Needed By: - Until: - Permanent Location: NMU Books (3rd floor)	Call Number: Q141 .A47 Index Call Number Type: Library of Congress classification Status: Item in place Due back: - Item Policy: Regular Material Type: Book	Item ID: 2348577890006216 Holdings ID: 2290899570006216 MMS ID: 995361053406216