Order – Acquire – Disseminate [v.4]

General disclaimer: This workflow is meant to be a set of guidelines. Your workflow may vary slightly depending on local decisions and consortial policy.

1. Order Request Submitted

Order requests are submitted in many ways, therefore mode of order request receipt (GOBI, e-mail, etc.) is not specified.

2. Real Time Acquisitions or EOD File Available?

Real Time Acquisitions (RTA) connects Alma directly with the vendor's ordering system to match/create bib records and PO Lines directly from the vendor's ordering system. RTA uses APIs to communicate ordering information to the vendor in real time, eliminating the need for sending brief records with order information back to the vendor and reducing instances of record overlay after ordering.
As of January 2017 Real Time Acquisitions is only compatible with YBP, Harrassowitz and Coutts.
For more information about the RTA process see the Real Time Acquisitions blog entry on the Developer Network and contact the vendor to discuss the additional cost and configuration of the integration.

Importing a file with **Embedded Order Data (EOD)** from a vendor creates bib records, PO Lines and inventory using import profiles and normalization rules (see details in Section 6).

Real Time Acquisitions or EOD File Available?

- If NO proceed to section 3
- If YES proceed to section 6

3. Search for bib record

The search box dropdown shows a variety of types of searches you can perform in Alma (All titles, physical items, funds, users, etc.). The availability of search types depends on your user roles. The contents displayed in the search results will vary depending on the type of search performed.

Search results appear in three tabs – Institution, Network or Community.

- The Institution tab shows all records, physical and electronic, that are available to your institution. Institution Zone records can be locally created records only accessible to your institution, or shared records that reside in the Network or Community Zones.
- The Network tab shows bib records for items held within the CSU system. This includes CO maintained electronic resources and physical titles held by other libraries in the CSU. The "Held By" (for physical items) and "Available For" (for electronic items) fields indicate what your institution owns and can access.
- The Community tab displays records for electronic resources in Alma across all Alma Institutions.

For detailed screenshots of the differences between each type of search, action links in each tab see Online Help (OLH) Topic Searching in the Repository. The Search Result Icon table on this page may be particularly helpful in deciphering where the bib record originated from and what type of access your institution has.

Acceptable match found?

- If NO proceed to section 4
- If YES proceed to section 5

4. Create or import new bib record

Bib records should be shared or linked to the Network Zone under most circumstances. For additional information differentiating what should reside in the NZ and IZ, see the Alma Network Zone policy. OCLC has been specified as the primary bibliographic utility of the CSU and as such any cataloging should be done in OCLC prior to record import (see Bibliographic Utility policy for additional guidance). If necessary, brief bib records can be created in the NZ for ordering purposes and overlaid by a complete OCLC record. See In-Process Brief Bib Records & Minimal Acquisitions Data policy for details. Also look at Overlaying Bibliographic Records in Alma: Procedures for procedural guidance on record overlay.

5. Create PO Lines and inventory in Alma

There are 3 ways to create PO Lines in Alma:

- Manual creation
- Real Time Acquisitions API – see section 2
- Import an EOD file – see section 6

Manual PO Line Creation

Role required: Purchasing Manager, Purchasing Operator

Breadcrumbs: Find the title you want to purchase using the Search Box.

In the search results, click the Order link to create a POL. Fill in and verify information on POL screen. The PO Line type selected at this stage will dictate the remaining purchasing and receiving workflow for the item and cannot be changed once the POL is created.

Inventory is automatically created when a POL is created unless otherwise specified. If you opt to assign inventory manually you'll need to create inventory before the POL can be sent for packaging.

Note: Receiving Notes are highly visible in Alma search results. Add anything to this field that you want to be immediately visible to everyone at every step of ordering/processing.

For step-by-step instructions see (OLH) Topic Manually Creating a PO Line.

Configuration options

Enable/Disable PO Line Types

Role required: Acquisitions Admin, General Systems Admin

Breadcrumbs: Acquisitions > Acquisitions Configuration > Configuration Menu > Purchase Orders > PO Line Types

PO Line Types inform the workflow the item will go through and the inventory created as a result of the purchase. PO Line Types are based on format (physical or electronic) and continuity type (one-time or continuous). PO Line Types cannot be changed in configuration, only enabled or disabled.

See OLH topic Enabling/Disabling PO Line Types.

Default Acquisition Method

Role required: Acquisitions Admin, General Systems Admin

Breadcrumbs: Acquisitions > Acquisitions Configuration > Configuration Menu > Purchase Orders > Acquisition Method

Configure the default acquisition method (purchase, approval plan, etc.) that appears in the drop down list when creating a PO Line.

See OLH topic Configuring the Default Acquisition Method.

- Proceed to section 7

6. Place order in external system or Import EOD file to create bibs and POLs

If Real Time Acquisitions is used, placing the order with the vendor will trigger bib record and POL creation in Alma. If your institution is using EOD the file must be imported to create bibs, POLs and inventory.

EOD import

Role required: Purchasing Operator, Purchasing Manager, Catalog Manager, Catalog Administrator

Breadcrumbs: Acquisitions > Import > Import

Import or FTP the file using a New Order import profile configured for EOD. Once the import profile is configured the actual import process is very simple – click Actions > Run Import and import the file using the appropriate EOD import profile.

A report of the import can be viewed from Acquisitions > Import > Monitor and View Imports. If the import profile report status = "manual handling required" click the link to find out what the issue is and resolve it. This job report also shows other job details such as bib records imported, POLs created, items created, etc. OLH Topic Resolving Import Issues may help troubleshoot import problems.

See OLH Topic Importing Records Using an Import Profile.

Configuring EOD import profile

The New Order import profile must be used. There are 2 ways to create a new import profile:

- Copy an existing profile
- Create a new profile from scratch

With either method, work with the vendor to create, test and finalize the profile. They should be able to walk you through what data needs to appear in the various fields to successfully import into Alma.

Copy an existing import profile

Role required: Purchasing Operator, Purchasing Manager, Repository Admin, Catalog Admin, General System Admin

Breadcrumbs: Resource Management > Resource Configuration > Configuration Menu > Record Import > Import Profiles

Find the Profile you want to copy. Select Actions > Copy. Modify appropriate data.

See OLH Topic Managing Import Profiles.

Create a new profile from scratch

Role required: Catalog Administrator

Breadcrumbs: Resource Management > Resource Configuration > Configuration Menu > Record Import > Import Profiles

Add New Profile and select New Order as Profile Type.

The Import Profile Details Wizard will guide you through set up. This configuration is where you specify where Alma finds the file, information about the vendor, how to map record fields to specific fields in Alma, schedule the job to retrieve the files at regular intervals, and other details.

See OLH Topic Managing Import Profiles.

For step-by-step instructions to create Normalization Rules (for step 3 in the Wizard) see OLH Topic Working with Normalization Rules.

Per CSU system-wide "Alma Network Zone" policy, configure the import profile to link or add records to the Network Zone unless they are truly local records, PDA/DDA records or data sharing is otherwise limited by the vendor.

Configuration Options

Purchasing Review Rules

Role required: Acquisitions Admin, General Systems Admin

Breadcrumbs: Acquisitions > Configuration Menu > Purchase Orders > Purchasing Review Rules

Only for use with EOD imports or Create POL API.

Indicates whether or not PO Lines must be reviewed by staff prior to packaging. Review rules can be created to ensure broad categories of POLs are reviewed in addition to reviewing very specific POLs and any variety of POLs in between.

Input parameters: are selected from a pre-defined list of options. Available options are assertion code (type of alert generated, for example "Already have inventory"), acquisition method, vendor code, PO line type, source type.

Output: True = PO line sent for review, False = PO line not sent for review and goes to packaging

A default rule is configured to indicate whether or not a POL should be reviewed if it does not meet the criteria of any other purchase review rules. The default cannot be altered beyond specifying True or False.

See OLH Topic Configuring Purchasing Review Rules

7. Review and package PO Lines

Review

PO Lines are sent for review if:

- there are data issues associated with the line (ex: incomplete or missing information)
- a purchase review rule indicates that PO Lines created by an EOD file or the Create POL API require manual review. Configuration options outlined above in "Purchasing Review Rules."

Role Required: Purchasing Operator, Purchasing Operator Extended, Purchasing Manager

Breadcrumbs: Order lines – review – [assigned to you or unassigned] in task list

Depending on your role and the PO Line you may perform the following actions to a PO Line in review: edit, assign or release assignment, start a trial, order now, defer, relink (to another bib record), cancel, delete.

See OLH Topic Reviewing PO Lines.

Package

Packaging PO Lines is the process of creating a PO to send to the vendor.

Automatic Packaging

PO Line Packaging Job must be enabled:

Role required: Acquisitions Admin, General System Admin

Breadcrumbs: Acquisitions > Acquisitions Configuration > Configuration > Acquisitions Job Configuration

Configure frequency and numerical item limit for PO Line packaging.

Vendor acct, owner, currency, continuity, acq method, source type and fund must be the same for POLs packaged together into a single PO.

See OLH topic Configuring the PO Line Packaging Job.

Manual Packaging

Manual packaging is specified at the time of PO Line creation in the Additional Information section at the bottom of the POL screen.

Role Required: Purchasing Operator, Purchasing Manager

Breadcrumbs: Acquisitions > Purchase Order > Package OR Order lines – packaging in Task List

Check off each PO Line you want to include on the PO and click Create New PO.

Once PO is created it is ready for approval.

See OLH Topic Packaging PO Lines into a PO.

Configuration options

Shipping Method

Role required: Acquisitions Admin, General Systems Admin

Breadcrumbs: Acquisitions > Acquisitions Configuration > Configuration Menu > Purchase Orders > Shipping methods

Create additional shipping methods available in the drop down list options during manual PO Line packaging.

See OLH topic Configuring Shipping Methods.

8. Purchase Order used to pay for items?

- If NO proceed to section 10
- If YES proceed to section 9

9. Review, approve and send PO to vendor

PO Review

Role required: Purchasing Operator

Breadcrumbs: Acquisitions > Purchase Order > Review OR Orders – review in task list

If information is missing or invalid when the PO is created it is sent for review. Once the information is corrected the PO moves to Approval. The Alert facet in the left column of the review screen indicates what is keeping the PO in review.

See OLH Topic Packaging PO Lines into a PO > Reviewing POs.

PO Approval

Automatic approval

Automatic PO approval is configurable by Ex Libris. In this case, once the PO Lines get packaged into a PO and reviewed, the PO moves through approval and is sent to the vendor without staff intervention.

Manual approval

Role required: Purchasing Operator

Breadcrumbs: Acquisitions > Purchase Order > Approve OR Orders – approval in task list

Verify vendor and order information. Edit, delete or approve and send the PO.

For E-Resources an Activation Task is automatically created after approval.

See OLH Topic Approving and Sending POs.

Configuration options

PO Line Cancellation Reasons

Role required: Acquisitions Admin, General Systems Admin

Breadcrumbs: Acquisitions > Acquisitions Configuration > Configuration Menu > Purchase Orders > PO Line Cancellation Reasons

Add to the dropdown list of reasons available for selection when a PO Line has been cancelled.

See OLH topic Configuring PO Line Cancellation Reasons.

10. Receive invoice

11. Create invoice in Alma

There are 3 ways to create an invoice in Alma

- EDI
- Excel Import
- Manual Creation or Creation from a PO

For step-by-step instructions for each method of invoice creation and information about VAT or accrual accounting see OLH Topic Creating Invoices.

EDI

Receiving invoices via Electronic Data Interchange (EDI) begins with configuring the vendor file to indicate to Alma that EDI communication about invoices and orders is expected from the vendor.

Configuration

Role required: Vendor Manager

Breadcrumbs: Acquisitions > Acquisitions Infrastructure > Vendors

Select a vendor to configure. Navigate to the EDI Information tab. Consult directly with the vendor for information needed to fill in all the fields. This tab is also where you schedule the FTP job to retrieve invoices.

The EDI Information Tab Fields table on the OLH page Electronic Data Interchange (EDI) describes in detail what information is required in each field.

Additional configuration details may be found on the Developer Network page EDI Integration in Alma.

Configuration note: You must check the Incoming box in this tab to ensure receipt of invoices.

Working with EDI files

Once configured, file retrieval using EDI is automated so you will primarily be working with reports or files generated from scheduled jobs. To find these reports and files:

Role required: Invoice Manager, Invoice Operator

Breadcrumbs: Search for the vendor in the search box.

> Actions > View history to see all jobs run.
>
> The actual EDI file can either be found in the Attachments tab or by clicking Actions > View EDI files.
>
> Reports associated with an EDI file can be found in the job file. (Alma menu > Administration > Monitor Jobs > History)
>
> See OLH Topic Electronic Data Interchange (EDI) > Working with EDI Files.
>
> Once the EDI file has been successfully uploaded search for invoices using the search box.

Excel import

Role Required: Invoice Manager, Invoice Operator, Invoice Operator Extended

Breadcrumbs: Acquisitions > Receiving and Invoicing > Create Invoice

> Creating the excel file: once the “From file” invoice creation option is selected on the Create Invoice page there is a link to an “Excel example” download that can be used as a template for your import.
>
> Once a file is uploaded on the Create Invoice page click Monitor jobs OR navigate to Administration > Manage Jobs > Monitor Jobs to see job progress and correct any errors indicated in the Alerts section.

Manual or From PO

Role required: Invoice Manager, Invoice Operator, Invoice Operator Extended

Breadcrumbs: Acquisitions > Receiving and Invoicing > Create Invoice

> **Manually**: Select “Manually” on the Create Invoice page and enter invoice details.
>
> Create invoice lines, assigning PO Line number, quantity, price, reporting code, funds, adding notes or attachments in the corresponding tabs.
>
> **From PO:** Select “From PO” on the Create Invoice page. Search for and select PO. Invoice lines auto-populate from the PO, one invoice line for each PO Line. Edit as needed and save.
>
> The Alerts tab indicates any errors or system generated messages.

Configuration options

Reporting Codes

Role required: Acquisitions Admin, General Systems Admin

Breadcrumbs: Acquisitions > Acquisitions Configuration > Configuration Menu > Purchase Orders > Reporting Codes

> Reporting codes can be used for acquisitions analytics and may vary from campus to campus depending on how they are configured. Codes are selected from a drop down menu during invoice creation.
>
> See OLH Topic Configuring Reporting Codes.

VAT Codes

Role required: Acquisitions Admin, General Systems Admin

Breadcrumbs: Acquisitions > Acquisitions Configuration > Configuration Menu > Invoices > VAT Codes

> Establish a VAT percentage that can be assigned to an invoice or invoice line as a default. Once a VAT Code is configured you can then select it from the dropdown menu in the VAT Code section

of the invoice Summary tab and it will apply to the invoice or invoice lines, depending on other VAT specifications.

NOTE: Using VAT codes is not recommended as it disables the option to key in other VAT percentages manually. It ultimately reduces the flexibility of your tax options. Proceed using VAT Codes with caution.

See OLH Topic [Configuring VAT codes.]

Default Payment Method

Role required: Acquisitions Admin, General Systems Admin

Breadcrumbs: Acquisitions > Acquisitions Configuration > Configuration Menu > Invoices > Payment Method

Configure the default displayed in the dropdown menu when selecting payment methods during new invoice creation. Useful to configure if a particular payment method is used more frequently than others.

See OLH topic [Configuring the Default Payment Method.]

Invoice Line Type

Role required: Acquisitions Admin, General Systems Admin

Breadcrumbs: Acquisitions > Acquisitions Configuration > Configuration Menu > Invoices > Invoice Line Types

To see this option in the configuration menu you must have "invoice_split_additional_charges" set to true in the Acquisition Configuration "Other Settings" table.

Configure what special invoice lines automatically appear on each new invoice (shipment, insurance, overhead and discount automatically appear out-of-the-box). Each invoice may only contain up to five invoice line types.

12. Review and approve invoice

Review

Role required: Invoice Operator, Invoice Operator Extended, Invoice Manager

Breadcrumbs: Acquisitions > Receiving and Invoicing > Review OR Invoice – review in the Task List

On the Review screen you can edit, delete or reassign invoices.

See OLH Topic [Reviewing Invoices.]

Configuration options

Invoice review rules

Role required: Acquisitions Admin, General Systems Admin

Breadcrumbs: Acquisitions > Acquisitions Configuration > Configuration Menu > Invoices > Invoice Review Rules

Invoice Review Rules come into play after invoices pass Validation but generated an alert.

Input parameters are selected from a pre-defined list of options. Available options are assertion code (type of alert generated, for example "Currency different from PO"), vendor code, invoice line number, invoice creation process.

Output Parameters: True = Send for manual review, False = Don't send for manual review.

See OLH topic [Configuring Invoice Review Rules.]

A default rule is configured to indicate whether or not an invoice should be reviewed by staff if it does not meet the criteria of any other purchase review rules. The default cannot be configured beyond specifying True or False.

Approve

Role required: Invoice Manager

Breadcrumbs: Acquisitions > Receiving and Invoicing > Approve OR Invoice – approval in the Task List

Browse or search for invoice. Once found you may edit (select this to approve), reassign or delete the invoice.

Click Approve to move invoice to Payment or Needs Additional Review to send back to review.

See OLH topic [Approving Invoices.]

Configuration options

Invoice approval rules

Role required: Acquisitions Admin, General Systems Admin

Breadcrumbs: Acquisitions > Acquisitions Configuration > Configuration Menu > Invoices > Invoice Approval Rules

Invoice Approval Rules can be created to ensure broad categories of invoices are reviewed, very specific groups are reviewed and any variety of invoices in between.

Input parameters: are selected from a pre-defined list of options. Available options are assertion code (type of alert generated, for example "Currency different from PO"), vendor code, invoice line number or invoice creation.

Output values: True = automated approval, False = manual approval.

A default rule is configured to indicate whether or not an invoice should be reviewed by staff if it does not meet the criteria of any other purchase review rules. The default cannot be configured beyond specifying True or False.

See OLH Topic [Configuring Invoice Approval Rules.]

Invoice Disapproval Reasons

Role Required: Acquisitions Administrator, General Systems Admin

Breadcrumbs: Acquisitions > Acquisitions Configuration > Configuration Menu > Invoices > Disapprove Reasons

Add invoice disapproval reasons available in the drop down list.

See OLH Topic [Configuring Invoice Disapproval Reasons.]

13. Pay Invoice

Currently there is no central solution in place to connect campus payment systems with Alma. Once the invoice is entered into Alma the workflow will depend on if/how you send invoice information to your campus accounting department for payment and whether or not you plan to enter additional payment information into Alma for record keeping. Review the configuration options below and set them to reflect your institution's payment process as they will dictate the invoice payment workflow in Alma.

Configuration options

Role Required: Acquisitions Administrator, General Systems Admin

Breadcrumbs: Acquisitions Configuration Menu > General > Other Settings

handle_invoice_payment

True = library plans to enter invoice payment information obtained from campus accounting (such as payment date, voucher number, etc.). Once invoice payment information is sent to

campus the status of the invoice remains open with a status of "waiting to be paid" until additional information is entered.
False = once library sends invoice information to campus accounting the invoice is marked as paid and closed. No further processing is required.

invoice_skip_erp

True = invoices are sent to campus manually or using some mechanism outside of Alma to convey invoice information or not sent to a central campus payment system at all.
False = invoice information is exported directly to Peoplesoft from Alma.

14. New/additional License required?

- If NO proceed to section 16
- If YES proceed to section 15

15. Create/update license record in Alma

Role required: License Manager
Breadcrumbs: Acquisitions > Acquisitions Infrastructure > Licenses

License information does not affect access or other functionality, license records in Alma are for record keeping.

Click add license and fill in information on the tabs presented by the license creation wizard:

- Summary – General information, date ranges, status.
- License Terms – terms of use, restrictions, etc.
- Inventory – populated if you associate the license with an activated e-Resource in your IZ

See OLH Topic Managing Licenses and Amendments.

Configuration options

License Sections Order

Role required: Acquisitions Admin, General Systems Admin
Breadcrumbs: Acquisitions > Acquisitions Configuration > Configuration Menu > Licenses > Sections Order

Configure the order each section appears in the License Terms tab. The name of each section is fixed but you can move them around or enable/disable sections depending on your institution's needs.

See OLH topic Configuring License Sections Order.

License Terms

Role required: Acquisitions Admin, General Systems Admin
Breadcrumbs: Acquisitions > Acquisitions Configuration > Configuration Menu > Licenses > Manage License Terms

Configure how you want license terms to appear in the License Terms tab. You may add or reorder terms and configure public display options.

See OLH topic Managing License Terms.

License Storage Locations

Role required: Acquisitions Admin, General Systems Admin

Breadcrumbs: Acquisitions > Acquisitions Configuration > Configuration Menu > Licenses > License Storage Locations

Define locations for physical license storage available in the drop down when adding a license.

See OLH topic Configuring License Storage Locations.

License Review Status

Role required: Acquisitions Admin, General Systems Admin

Breadcrumbs: Acquisitions > Acquisitions Configuration > Configuration Menu > Licenses > License Review Status

Define statuses available in the status drop down menu that describe where the license is in the review process.

See OLH topic Configuring License Review Statuses.

16. Receive or Activate resource

Physical Material Receiving

Role required: Receiving Operator

Breadcrumbs: Acquisitions > Receiving and Invoicing > Receive

Ensure that you are "Currently At" the correct location to receive the item you are working with.

Find item in One Time or Continuous tab, as appropriate.

Verify Received Date on the screen is correct. Check Keep in Department if additional work is required prior to shelving. If checked a work order is automatically created and you are required to select the Next Step.

To receive:

- Check the box next to the corresponding POLs you want to receive and click the Receive button at the top of the page.
- Click Manage Items > Edit inventory to add barcode or other physical item information and then Receive.

See OLH Topic Receiving Physical Material.

Configuration options

Item sort routines

Breadcrumbs: Resource Management > Resource Configuration > Configuration Menu > General > Physical Item Sort Routines

Role Required: General System Admin

Create a customized way to sort/view items in the Receive Items list.

See OLH topic Configuring Physical Item Sort Routines.

Receiving department validations

Role required: Acquisitions Admin, General Systems Admin

Breadcrumbs: Acquisitions > Acquisitions Configuration > Configuration Menu > General > Receiving Department Validations

Activate department validation checks when an item exits receiving (for example: activate a dialog box asking if item has a barcode before leaving Receiving).

See OLH topic Configuring Receiving Departmental Validations.

Electronic Material Activation

Role Required: Electronic Inventory Operator, Electronic Inventory Operator Extended

Breadcrumbs: Resource Management > Manage Inventory > Manage Electronic Resource Activation OR Electronic resources - activation in the Task List

Ensure that you are "Currently At" the correct location to activate the item you are working with.

From the E-Resources Activation Task List page you can edit, activate, test access, assign, change the status and delete the task.

Electronic collections are activated using the Activation Wizard. Search for the Electronic Collection in the search box. Look in the:

- Community tab for brand new resources that are not maintained by the CO
- Institution tab for new collections that were not found or not ordered in the CZ
- Note: The Network tab shows CO maintained resources but no local activation is required for each institution. The resource will appear as "Available for" your institution if you have access through the central license.

Once the appropriate collection is located click the Activate link and follow the steps of the Activation Wizard, entering information about the collection, services and activation method.

Click Actions > Done to remove the title from the Task List.

Portfolios do NOT need to go through the Activation Wizard. Portfolios require confirmation that the resource can be activated by clicking Actions > Activate.

Databases do NOT require activation; they are automatically activated.

Batch Activation: You can activate a collection or selected portfolios via Excel file upload. Details on batch activation can be found in the OLH Topic listed below.

See OLH Topic Managing Electronic Resources > Activating Electronic Resources.

17. Additional processing required?

- If NO proceed to section 20
- If YES proceed to section 18

18. Send to work order department

Role Required: Work Order Operator AND Receiving Operator OR Purchasing Operator

Breadcrumbs: Fulfillment > Resource Requests > Manage In Process Items OR Acquisitions > Post-Receiving Processing > Receiving Department Items

Work orders are created to handle items that require additional processing before going to the shelf (for example cataloging, adding call number stickers, etc.).

Browse or search for the record on the In Process Items page. From the Actions button you can edit inventory, add notes, update expiration dates, print slips or un-receive. On this page you can also change the status of the record.

See OLH topic Post-Receiving Processing.

For additional details about work orders see the Work orders workflow diagram and narrative document found on the ULMS project website.

Configuration options

Avoiding transit to circ desk for shelving after receiving

Role required: General System Admin

Breadcrumbs: Administration > General Configuration > Configuration Menu > Work Orders and Departments > Work Order Types [configure at the library level]

In order to streamline the receiving process, you can set up a circulation desk to fully function as an acquisition desk. This means that you will never need to use an 'acquisitions desk'. Instead, all acquisitions staff will use the 'circulation desk' as their primary desk and items will not need to transit to the circ desk for shelving after they are received.

To set configure this option, see Ex Libris article Receiving Acquisition In Process items in order to avoid In Transit.

Work order types

Role required: General System Admin

Breadcrumbs: Administration > General Configuration > Configuration Menu > Work Orders and Departments > Work Order Types

Work order types indicate the general process to be carried out on an item (for example binding or cataloging). Add additional work order types to

Configuration note: Work order type "AcqWorkOrder" is an out-of-the-box type. The name, descriptions and statuses can be changed but not the Code. And this type cannot be removed. When something is marked Keep in Department it will automatically be assigned this type and you will select a status within this type.

See OLH Topic Configuring Work Order Types.

Work order type statuses

Role required: General System Admin

Work order statuses indicate what task within the work order process is being performed on a resource. Additional tasks may be specified by configuring work order type statuses (for example, adding a status to distinguish between the item residing in the on-site bindery or off-site bindery).

See OLH topic Configuring Work Order Types > Configuring Work Order Type Statuses.

19. Work order completed

20. Item/Resource available

Physical items must be scanned once they are ready for shelving to set the status from In Transit to Item in Place, unless the main circulation desk has been specified as a receiving/work order department (see section 18, configuration option Avoiding transit to circ desk for shelving after receiving).

Role required: Requests Operator

Breadcrumbs: Fulfillment > Resource Requests > Scan In Items. Ensure that you are "Currently At" the circulation desk.

Select Done > Yes on the screen and enter information in the Scan item barcode field. Alma will indicate the next location for the item.