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Resource Management Workflows with Alma LMS

"Meet our Staff" Erasmus week 2025

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Abstract

How we manage the different book workflows, from cataloguing and retrospective cataloguing to preservation actions : setting up Alma work orders, reminders and moves functionalities.

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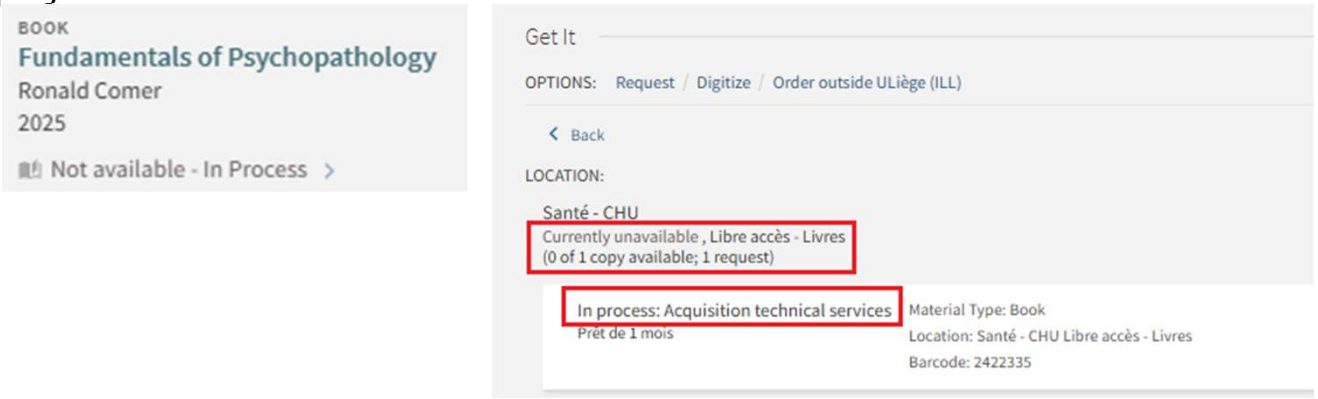
Alma Work Orders

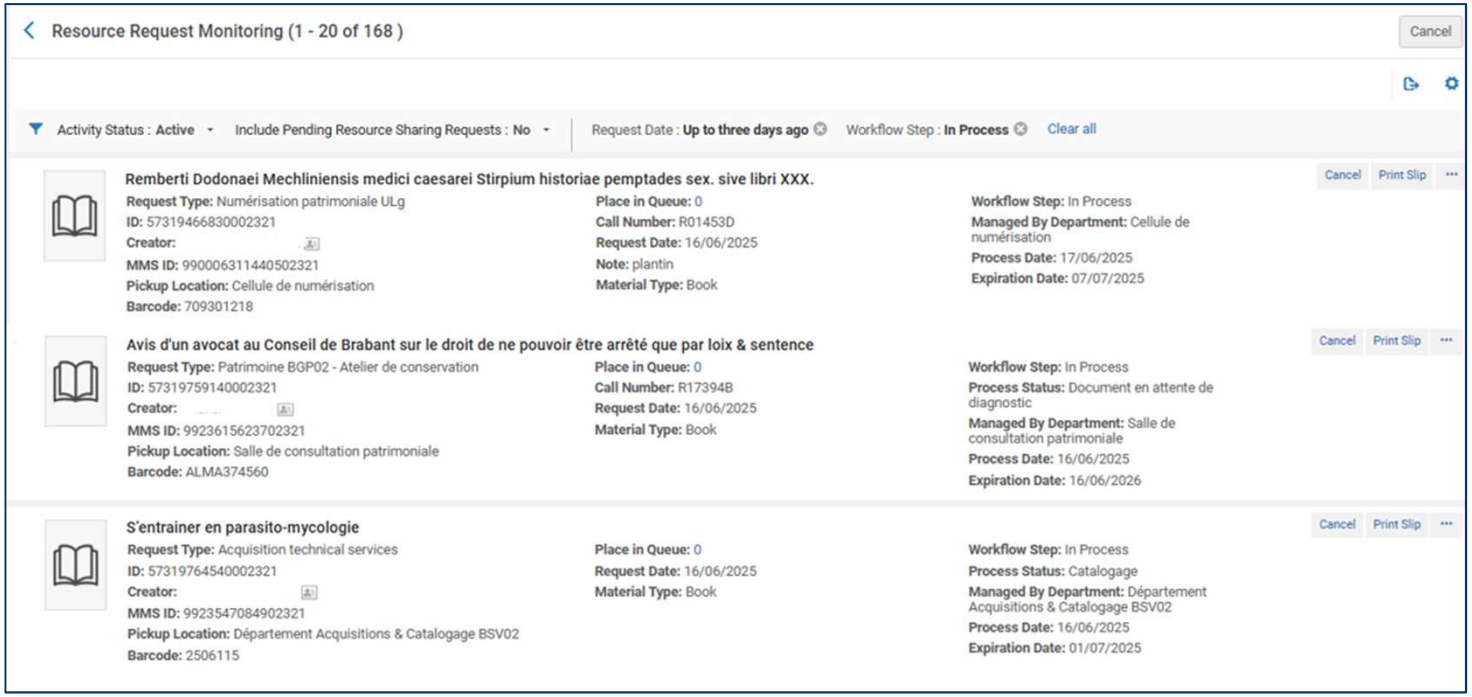
Alma Work Orders

- A Work Order is an internal request within Alma physical resources repository
  - which send the item into a processing department
  - making the item unavailable until the end of processing
    - the end user is informed that the item is unavailable in PrimoVE list of results and in Full display Get It section



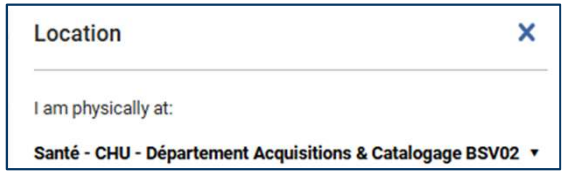
Alma Work Orders

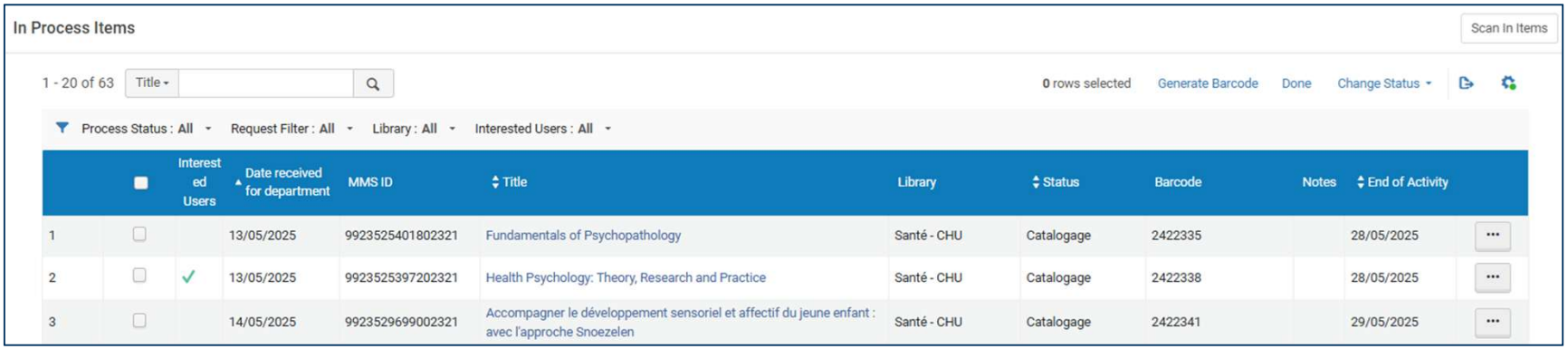
- Staff users can monitor items in process



Alma Work Orders

- Items can be processed within a dedicated department





		Interested Users	Date received for department	MMS ID	Title	Library	Status	Barcode	Notes	End of Activity	
1			13/05/2025	9923525401802321	Fundamentals of Psychopathology	Santé - CHU	Catalogage	2422335		28/05/2025	...
2		✓	13/05/2025	9923525397202321	Health Psychology: Theory, Research and Practice	Santé - CHU	Catalogage	2422338		28/05/2025	...
3			14/05/2025	9923529699002321	Accompagner le développement sensoriel et affectif du jeune enfant : avec l'approche Snoezelen	Santé - CHU	Catalogage	2422341		29/05/2025	...

Alma Work Orders

- We can configure several work orders
- Associate a department or a circulation desk
  - Staff users must be located in a separate department or can manage processing from their circulation desk
    - Separate department is useful for operations that go beyond basic procedures
    - Small libraries (1-2 staff) prefer to handle all tasks from the circulation desk
    - Large units use the circulation desk first, then dispatch to departments
- We can define work time (in days)
- A department has dedicated staff
  - But work orders are managed by all users linked to the circulation desk
- Finally, we can configure processing steps

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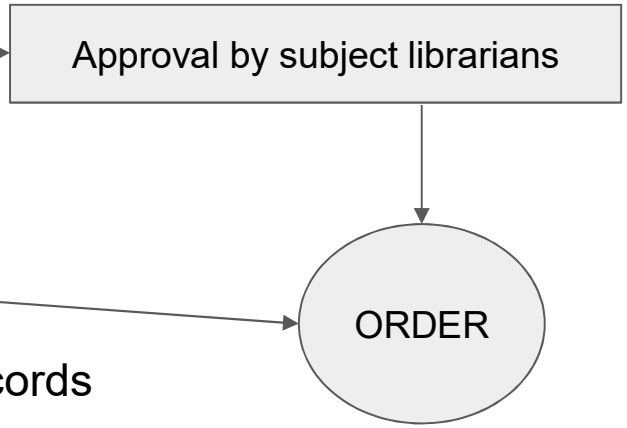
Alma Work Orders

Acquisition workflows

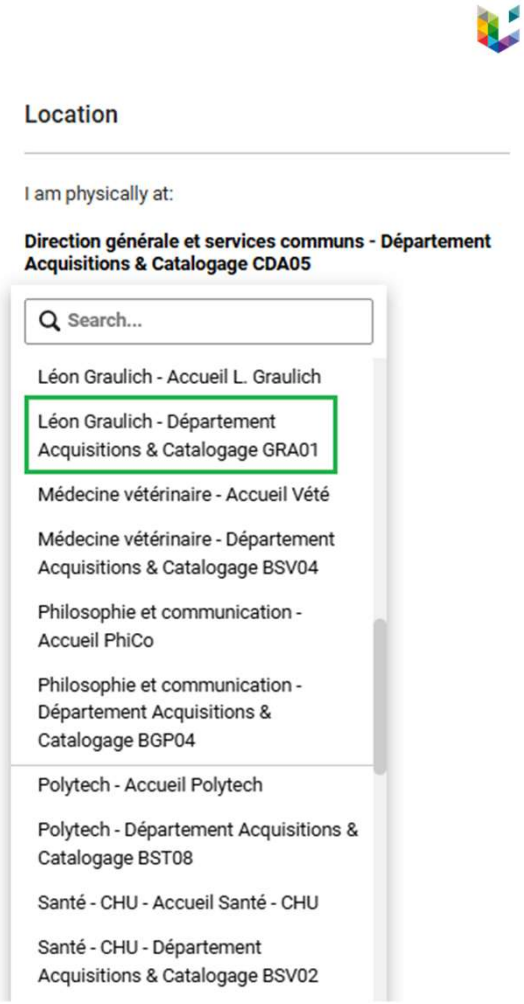
Acquisitions workflows

- Alma purchase request functionality
  - end users requests via Primo
  - staff requests within Alma
- Lists by subject librarians
  - staff requests within Alma
  - minimal bibliographic records or full level records
    - depending on the person
- E-Resources
  - Mostly bibliographic records from Alma Community Zone
  - Activation of the resources but very few cataloging task
    - local resources not available in CZ
    - databases
    - resources contributed to CZ



Acquisitions workflows

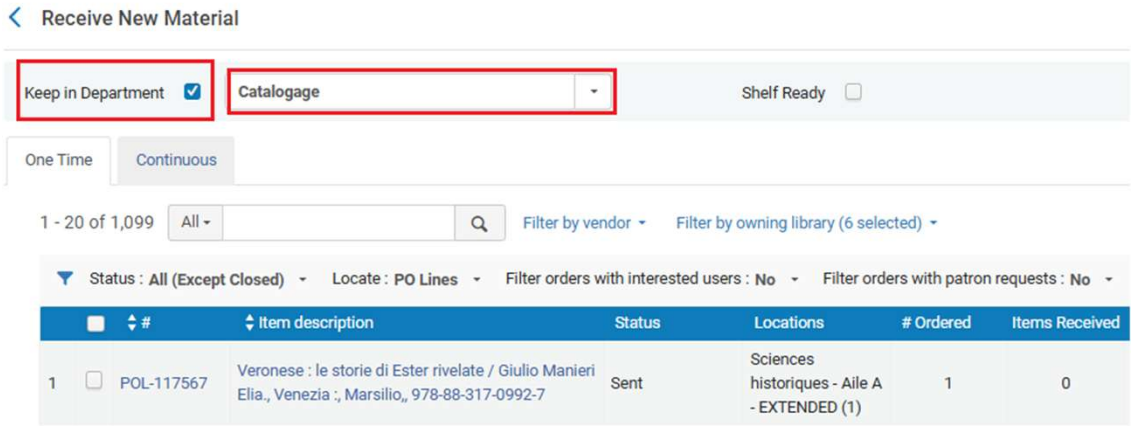
- In order to work in Acquisitions, staff user has to be located in an Acquisitions Department, with dedicated roles
  - 1 library = 1 department
  - relationships can be defined
    - a library can receive items for another library
- Acquisitions Department means a “work order” configuration in Alma
  - OTB for Acquisitions



Acquisitions workflows

Receive

Keep in Department



No if you can make the resource available immediately

Yes if you have to catalog, classify, equip => so you can't make the resource available immediately, even if you are alone and don't want to change your location in the system.

Acquisitions workflows

- Post-receiving processing stages
  - Cataloguing
  - Physical equipment
  - Indexing / classify
- Integrate current cataloguing operations to the post-receiving process
  - Metadata quality control / physical condition review
- Need to separate retrospective cataloging for remote storage items

4 steps defined within the Acquisitions Work Orders configuration

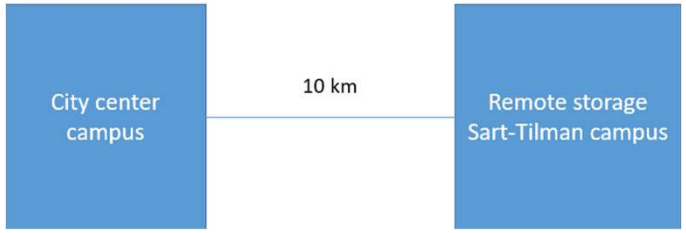
=> Setting up a new work order with its own department and stages

Alma Work Orders

Resource management and Preservation workflows

Resource management & Preservation workflows

- Retrospective cataloguing Work Order
  - Remote storage resources
  - Heritage room in city center
  - Check library holdings when processing donations
  - Improve metadata
  - 19th-20th century collections
  - Rare materials
  - Cataloguers for rare materials (1,5 FT); cataloguers for other collections (3 FT)
  - Physical inventory operators (1 FT)



Resource management & Preservation workflows

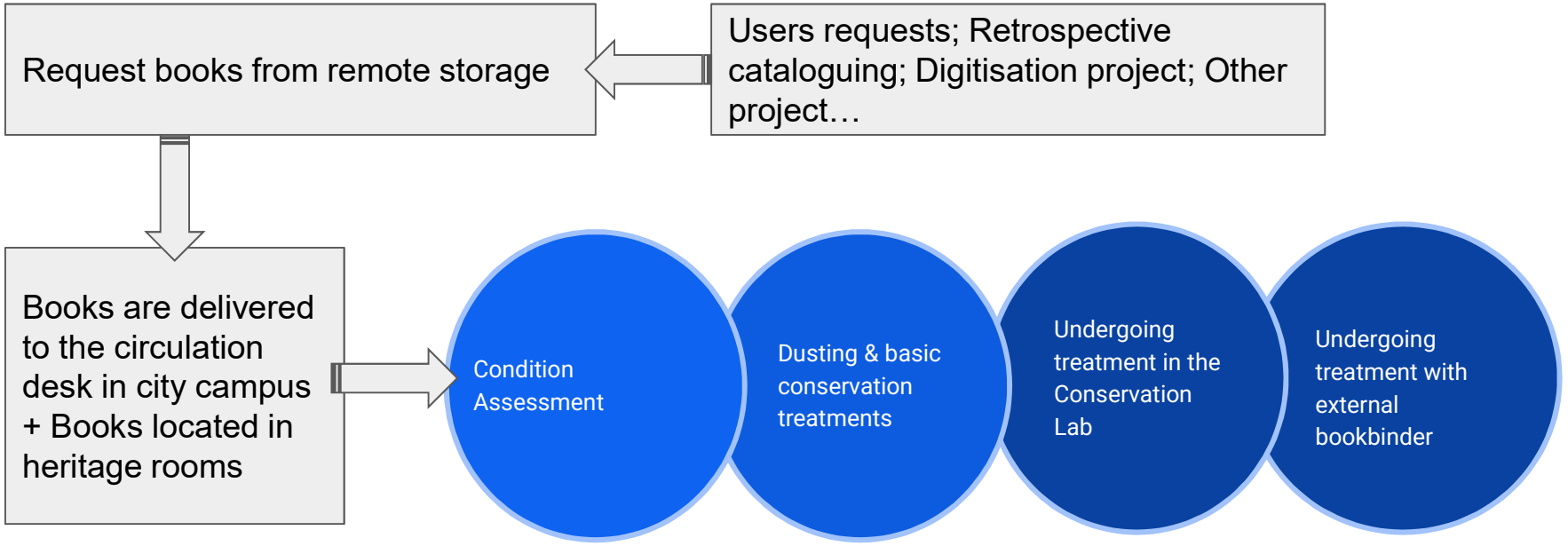
- Launched in october 2019
  - Around 4,200 items passed through this workflow (as at june 20)
- Attached to Library ‘Site central’ in City center campus
- 2 stages
  - Checking
  - Cataloguing
- Attached to Library ‘Site central’ in City center campus
- Supports staff-requested items for processing
- Enables a separate workflow for user-requested items from the remote storage

Cataloguing and physical resources management workflows

- Conservation & Binding Work Order
  - ULiège Library binding and conservation unit (1 bookbinder + library curator)
    - Attached to Library ‘Site central’
  - Stacks assistant for basic treatments
  - 6 stages
    - Pending assessment
    - Pending verification
    - In conservation queue
    - Undergoing treatment in the Conservation Lab
    - Standard housing
    - Undergoing treatment with external bookbinder
  - Launched in august 2017
    - More then 11,500 items passed through this workflow (as at june 20)

Cataloguing and physical resources management workflows

❑ Conservation & Binding Work Order



Cataloguing and physical resources management workflows

- Binding Work Order
  - For standard binding process: serials binding, repairs on circulating collections…
  - Configured for each library that requested it, since August 2017
  - 3 stages
    - In preparation
    - At the bookbinder's
    - Quality check upon receipt
  - Around 6,400 items treated since August 2017

Cataloguing and physical resources management workflows

- Digitisation Work Order
  - Same workflow
    - Requests from remote storage or heritage room collections
  - Digitisation Department
    - Set up at ULiège Library level
    - 1 project manager + 3 staff members (2 librarians, 1 digitisation technician)
    - 3 stages
      - dusting
      - cataloguing
      - digitisation
  - Launched in august 2017
    - Around 3000 volumes underwent this specific workflow in Alma

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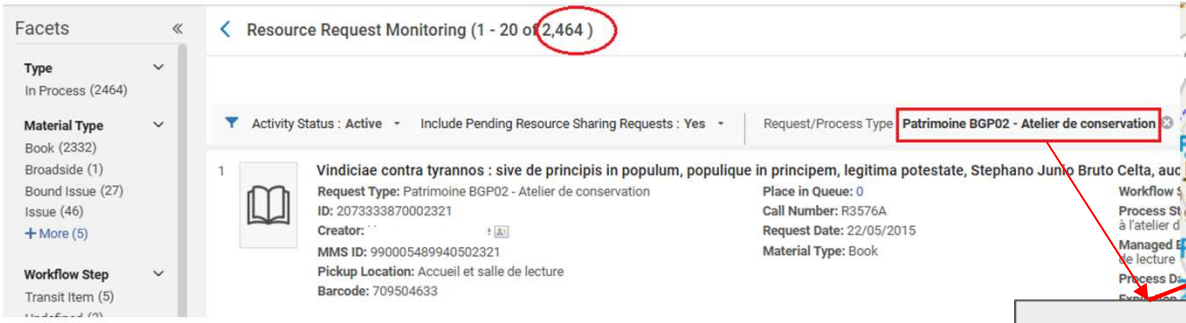
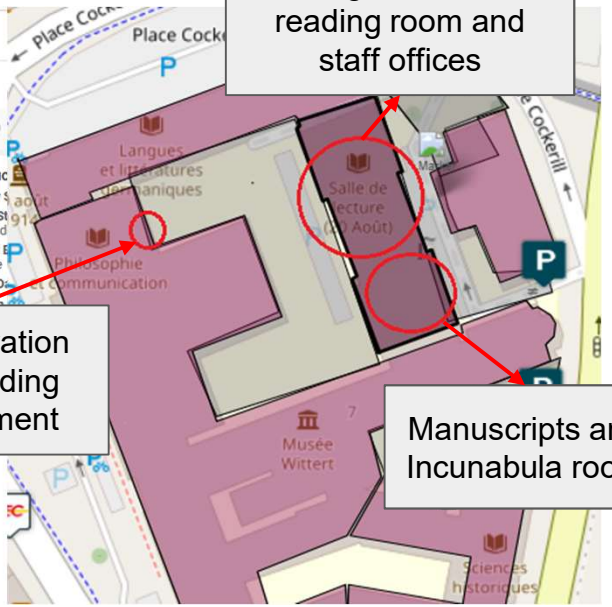
Alma Work Orders

If it were that simple…

Alma Work Orders

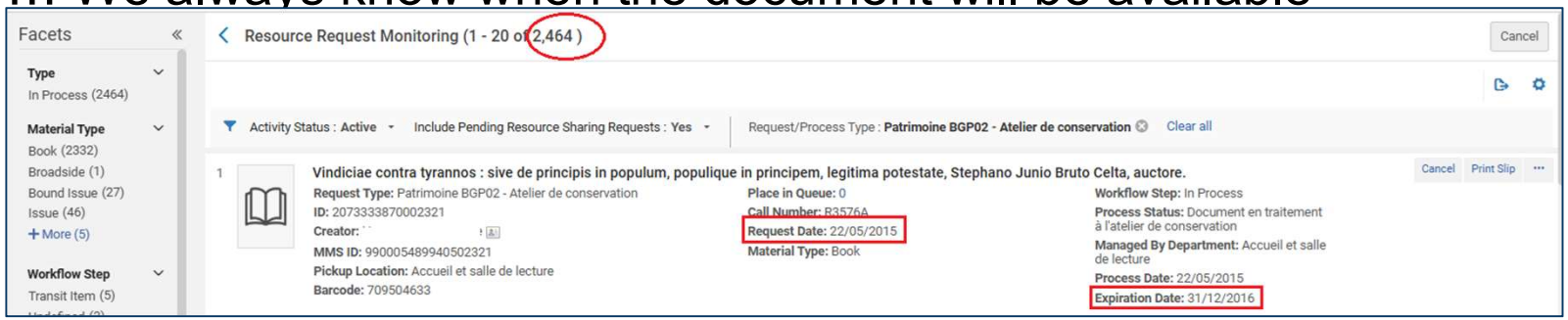
… So we always know where the document is

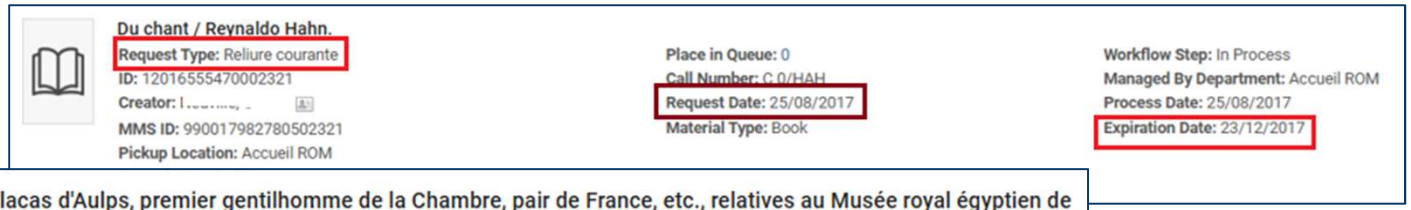


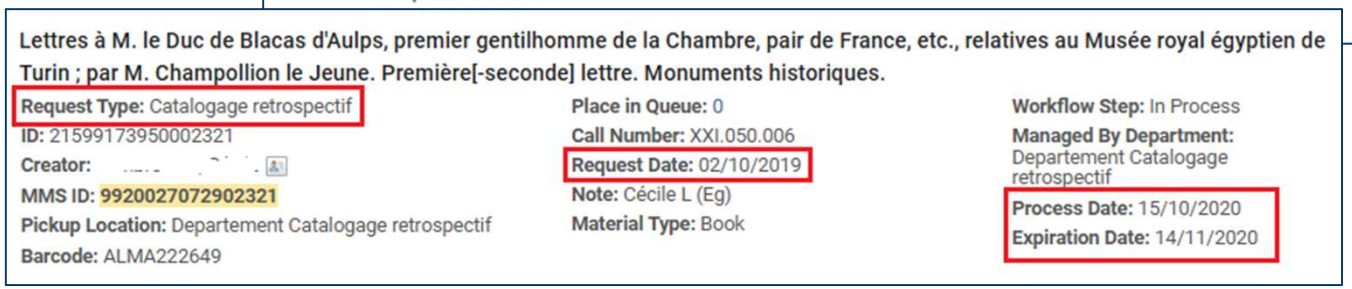


Alma Work Orders

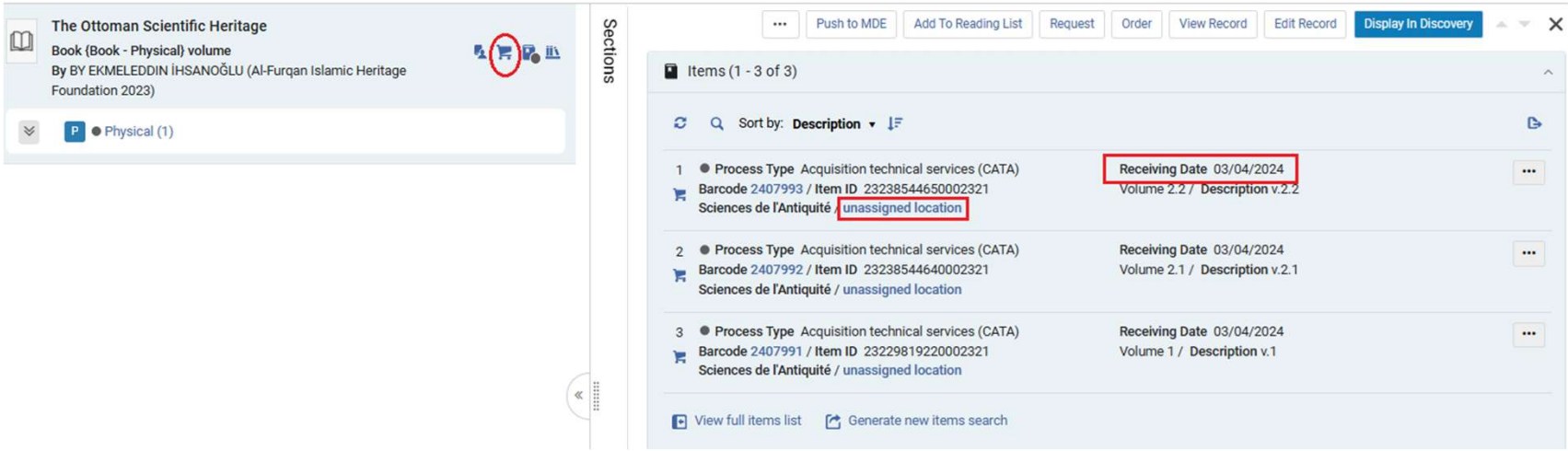
… We always know when the document will be available







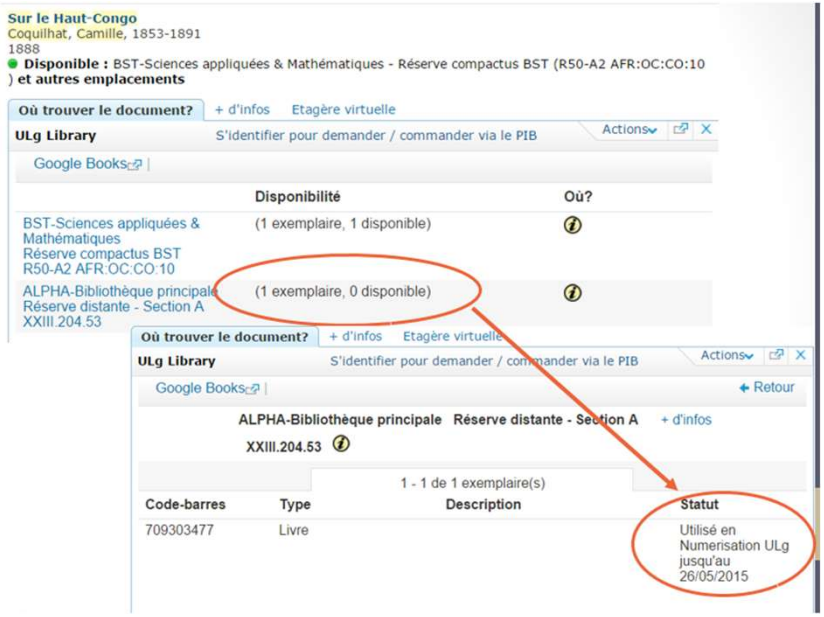
Alma Work Orders



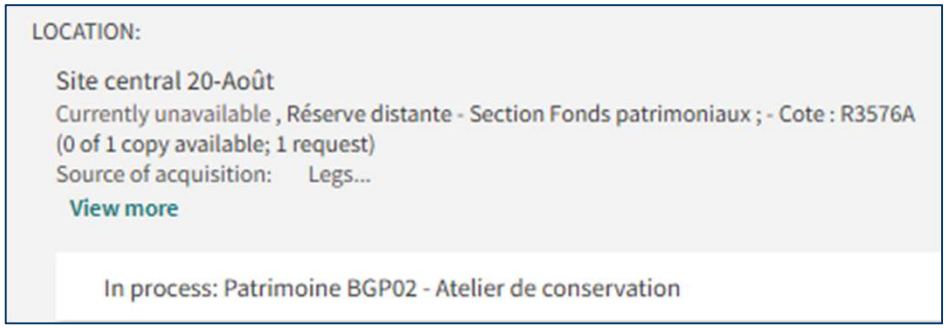
What's the most complicated?

Ottoman Heritage or Cataloguing?

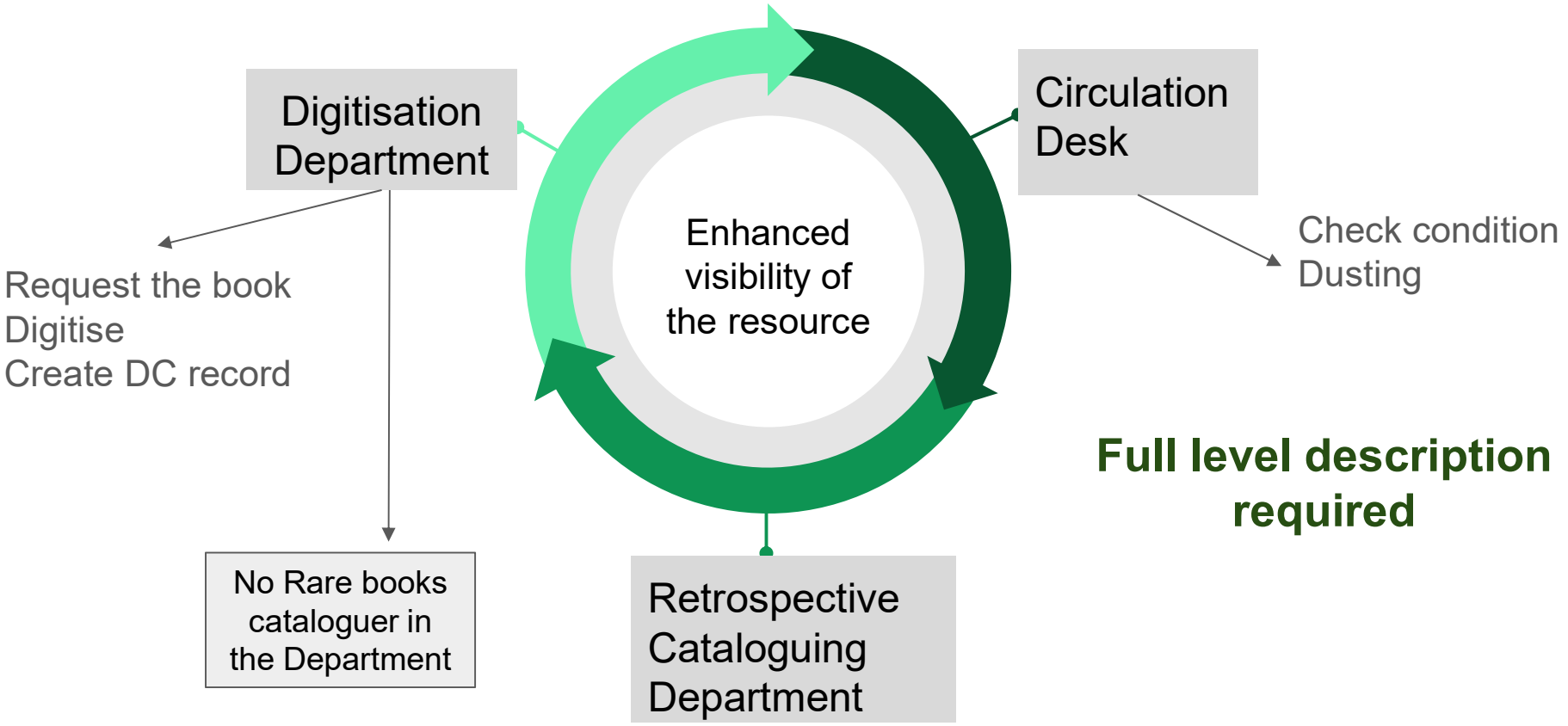
Alma Work Orders



- At the beginning, we displayed the supposed end date of the treatment in Primo
- Now, we just tell it's in process…



Alma Work Orders



Full level description required

Alma Work Orders

- 2 work orders
- Different teams
- Different skills

I'll send you a mail and drop the book on your desk.

We can share an excel file for tracking.

We'll do both, it'll be better.

Sorry, I'm a cataloguer on holiday. Too bad for your digitisation project. You can send a email to my colleague, maybe he can help you.

=> Make use of the "Reminders" feature

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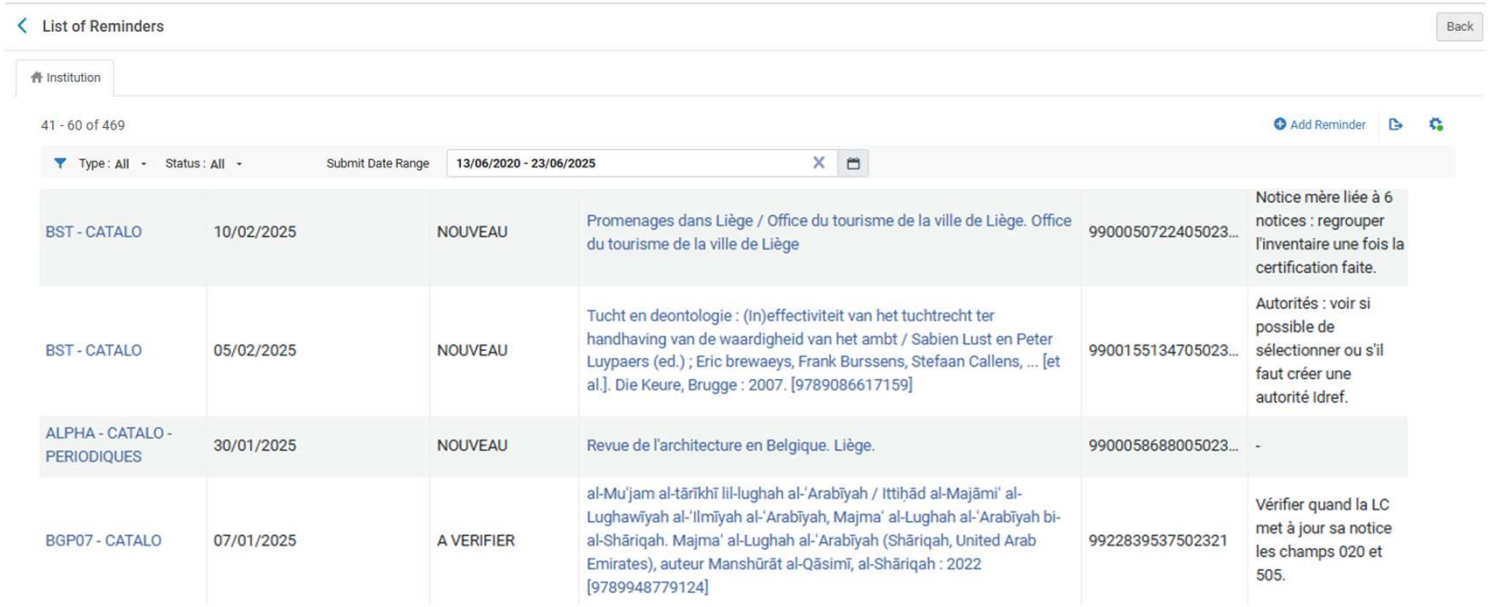
Alma Reminders

Reminders on bibliographic titles

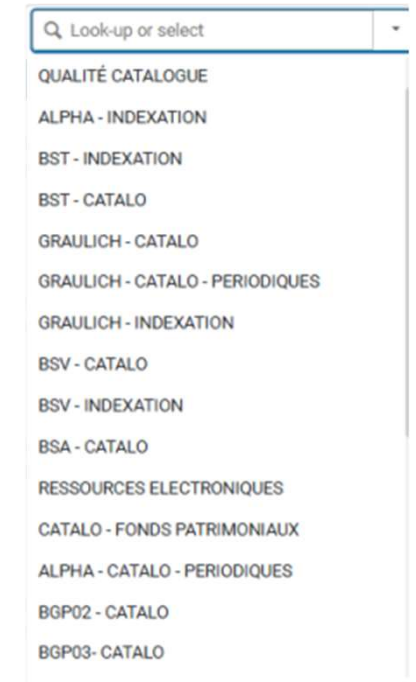
- Treatment reminders can be added to bibliographic titles
  - from search result
  - from metadata editor
  - from the feature itself



BST - CATALO	10/02/2025	NOUVEAU	Promenages dans Liège / Office du tourisme de la ville de Liège. Office du tourisme de la ville de Liège	9900050722405023...	Notice mère liée à 6 notices : regrouper l'inventaire une fois la certification faite.
BST - CATALO	05/02/2025	NOUVEAU	Tucht en deontologie : (In)effectiviteit van het tuchtrecht ter handhaving van de waardigheid van het ambt / Sabien Lust en Peter Luypaers (ed.) ; Eric brewaeys, Frank Burssens, Stefaan Callens, ... [et al.]. Die Keure, Brugge : 2007. [9789086617159]	9900155134705023...	Autorités : voir si possible de sélectionner ou s'il faut créer une autorité Idref.
ALPHA - CATALO - PERIODIQUES	30/01/2025	NOUVEAU	Revue de l'architecture en Belgique. Liège.	9900058688005023...	-
BGP07 - CATALO	07/01/2025	A VERIFIER	al-Mu'jam al-tārīkhī lil-lughah al-'Arabīyah / Ittiḥād al-Majāmi' al-Lughawīyah al-'Ilmīyah al-'Arabīyah, Majma' al-Lughah al-'Arabīyah bi-al-Shāriqah. Majma' al-Lughah al-'Arabīyah (Shāriqah, United Arab Emirates), auteur Manshūrāt al-Qāsimī, al-Shāriqah : 2022 [9789948779124]	9922839537502321	Vérifier quand la LC met à jour sa notice les champs 020 et 505.

Reminders on bibliographic titles

- At first, we imagined a reminder type for each library
- We also had ‘heritage cataloguing’, ‘serial cataloguing’, ‘e-resources cataloguing’, a general ‘metadata quality’...
- But Alma reminders don’t show up in any ‘task list’
  - It’s up to cataloguers to check if something needs to be done
  - The cataloguer may choose to use the feature - if he’s aware it exists
- Not a complete process
  - Cataloguer has to delete the reminder manually
  - We can’t know if the treatment has be done



Reminders on bibliographic titles

- Feature introduced to the Digitisation team in spring 2023 to enhance workflow and communication with cataloguing staff
  - Retrospective and heritage cataloguing team now required to review

List of Reminders

Type : **NUMERISATION PATRIMOINE AVANT 1830** Status : **All** Submit Date Range **13/06/2020 - 23/06/2025**

	Type	Date	Status	Title	Entity ID	Text	Created By	Modified By
1	NUMERISATION PATRIMOINE AVANT 1830	23/06/2025	Catalo Alma à revoir	Manipulus theologiae moralis de sacramentis, cum resolutione difficultatum circa illa in praxi occurrentium, de Censuris, Casibus Papae, & Episcopo reservatis, cum dilucida eorum explicatione Manigart, Jean Henri religieux 1615?-1682, auteur Leodii Ex officina Typographica Viduae Balduini Bronckart, [Liège] : 1660	9900051571705023...	-	U215383	U215383
2	NUMERISATION PATRIMOINE AVANT 1830	20/06/2025	Encodage DONum à revoir	Remberti Dodonaei Mechliniensis medici caesarei Stirpium historiae pemptades sex. sive libri XXX. Dodoens, Rembert, 1517-1585, auteur Antverpiae, Ex officina Christophori Plantini. M.D.LXXXIII, [Anvers] : 1583	9900063114405023...	PLANTIN	U204582	U213763
3	NUMERISATION PATRIMOINE AVANT 1830	20/06/2025	Encodage DONum à revoir	Itinerarium Beniamini Tudelensis ; in quo res memorabiles, quas ante quadringentos annos totum ferè terrarum orbis notatis itineribus dimensus vel ipse vidit vel a fide dignus suæ ætatis hominibus accepit, breuiter atque dilucidè describuntur; ex Hebraico Latinum factum Bened. Aria Montano interprete. Benjamin de Tudèle, 1130?-1173, auteur Antverpiæ, ex officina Christophori Plantini, architypographi regii. M.D.LXXV, [Anvers] : 1575	9922170615502321	PLANTIN	U204582	U213763
4	NUMERISATION PATRIMOINE AVANT 1830	18/06/2025	A VERIFIER	En l'assemblée du Conseil municipal de la cité de Liege, tenue le 29 juillet 1790, après-midi. L'approbation éclatante, dont le public a daigné accueillir le plan provisoir de constitution municipale... / Rouveroy, autorisé A Liege, chez la Veuve S. Bourguignon, [Liège] 1790	9900001994405023...	Pls parties manquantes dans donum, le volume n'a pas été entièrement numérisé	U204582	U204582
5	NUMERISATION PATRIMOINE AVANT 1830	11/06/2025	A VERIFIER	Catalogue des livres imprimés, ou qui se trouvent en nombre, chez Debure, frères, libraires, quai des Augustins, près de la rue Pavée, à Saint Paul. [Guillaume Debure et François-Jean-Noël Debure], [Paris] 1780	9900000363205023...	Varia _ manque pls partie dans Donum	U204582	U204582

Reminders on bibliographic titles

- A useful workflow for Digitisation team
- Links Digitisation Work Orders with retro-cataloguing Work Orders
  - Reminders are informative
  - While Work Orders indicates ongoing actions
- Once the task is completed, the reminder is deleted
- Staff from both teams are involved in the process

=> Effective Follow-up for This Use Case

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Think again about our Alma-Donum integration

Integrating DONum into Alma - 2025-2026 Projects

- Set up true integration between the tools with Alma APIs
- And further improve parts of the process
  - Use APIs allows retrieving BIB, HOL, and Item data, updating HOL records to add preservation actions, and creating or updating the digital inventory…
  - Perhaps we could work with “Reminders” APIs
    - Could enable the digitization team to manage reminders directly in DSpace — no more tool switching.

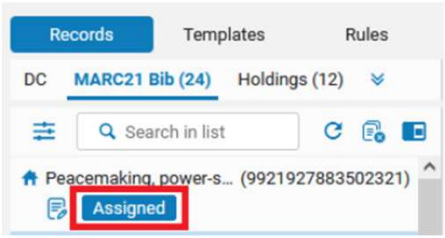
Assigning records

Assigning records

- Users of the Metadata Editor can “assign” records to other users of the Metadata Editor
  - Users with “cataloguing” role in Alma if the record is a Bibliographic or Authority record
  - Users with “physical inventory operator” role if the record is a Holding record
- This is very useful for verification requests, authority data creation requests, correction requests, or error reporting…
- The record opened in your metadata editor environment will be sent to your colleague metadata editor environment:
  - You add a note with your request
  - And you can check a box “Send as Email”

Assigning records

- ❑ Your colleague will receive an award notice by mail, that contains the note of the request
- ❑ In his/her Metadata editor, a new record will be listed:



- ❑ The note can be edited in the Metadata editor and new notes can be added

=> The person who submits the initial request has no follow-up unless the other person replies

=> There is no trace of the request: you must keep track of the record and the request yourself (assuming you have a small piece of paper nearby)

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Move functionalities

Move functionalities… before

- Use case :
  - Philosophy Library will not conserve a set of books but will send them to Remote Storage
  - Books are crated and sent
  - Sometimes, location information or call number is deleted
    - Inventory operators have a defined scope per library for the holdings records they can edit

=> But the item remains available in the Discovery

- End users can request the books !

Move functionalities… before

- Alma has also a “Change item” functionality
  - If you are located in Library 1
  - and you scan a book from Library 2
  - the book is now located in your Library 1
  - Can be done by circulation desk staff without complete knowledge of inventory structure

  => Useful for one-time changes without delay

  => Counterproductive if there are many items to move

Move functionalities now

- Use case:
  - Philosophy Library will not conserve a set of books but will send them to Remote Storage
  - Books are crated
  - A “Move permanently” request is created for each item
  - Destination site must accept the transfer and ensure crates can be processed or stored
    - Books can be sent
  - Each item is scanned in the new library, so that holding record is now recorded for this library
  - Once the process is done, the book goes back to ‘Available’ status

Move functionalities now

=> What's new with this process?

- Documents can be tracked
- They are marked as unavailable
- Destination library can accept or reject (in this case, item can be deleted or stay in transit status)

A new way to manage the relocation of collections

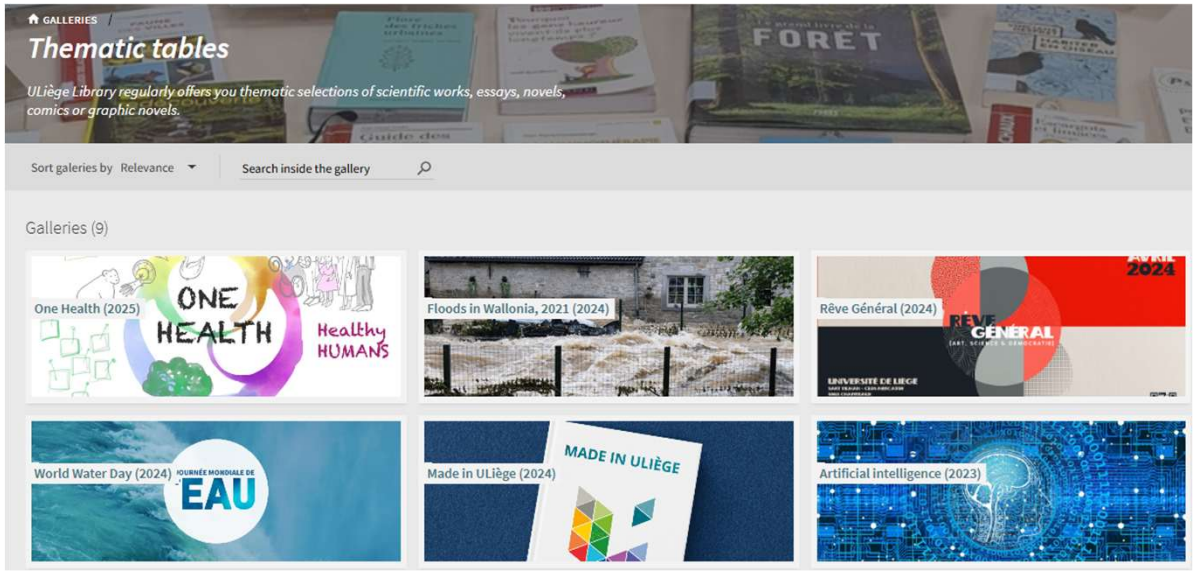
- Launched in june 2021; as of june 2025:
  - 2600 requests made
  - 1910 completed
  - 380 active requests : items are in transit between 2 libraries
  - around 300 rejected requests : not the right time or any other reason

Move functionalities now

- Not so easy to get new features accepted
- Is this method really being used for most of the transfers?
- In the meantime, the library scope has been enlarged to all libraries for all physical inventory operators
  - Books can move incognito between locations
- System admin can do bulk transfers by job
  - Mainly used for relocations in a same library

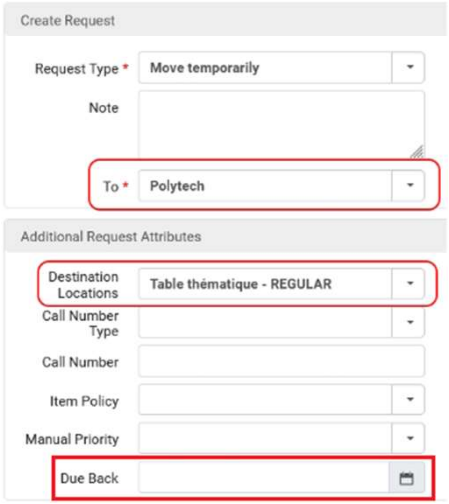
Move functionalities now

- Use case:
  - Sometimes, a library may not own a title it temporarily needs - but that is available at another library
    - This often happens when preparing Thematic tables



Move functionalities now

- Use case:
  - The owning library sends the book and tracks it using a “Move temporarily” request type
  - The destination library scans the barcode and assign a temporary library and location to the item
  - A “due back date” can be entered in the form



=> Alma will automatically run a 'Restore Item' job on the scheduled date

=> The ‘Restore request’ appears in the circulation desk operator’s task list and the Resource Request Monitoring list so it can be processed to complete the workflow.

Move functionalities now

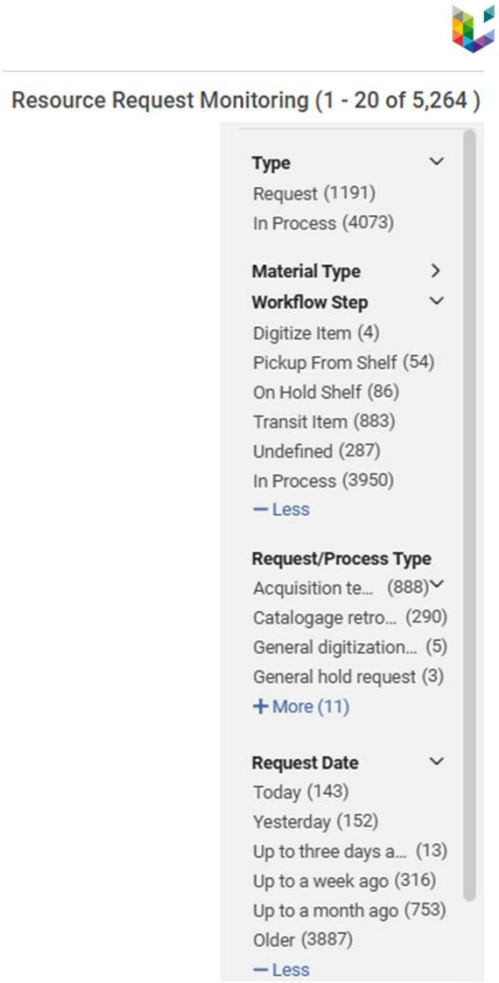
- Around 820 requests created since 2015
- The feature was officially launched (i.e. documented) in 2023
- There are always loose ends
  - From the “Restore Item” task
  - Items are still in transit between libraries
  - …

Internal transfers: synthesis

Move functionalities, Work orders

- Some issues
  - The barcode was scanned too many times or not enough
  - Some task tracking procedures were not clearly explained (e.g. “restore”)

  => Reminders often need to be sent
- But very useful monitoring
- Events can be retrieved via the statistics module



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