

Resource Management Workflows with Alma LMS

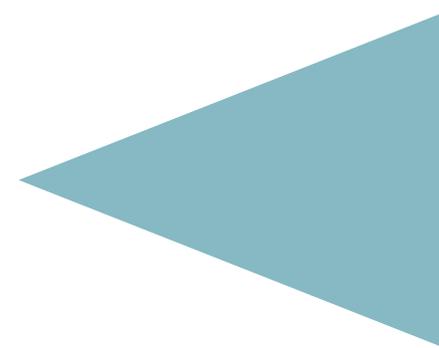
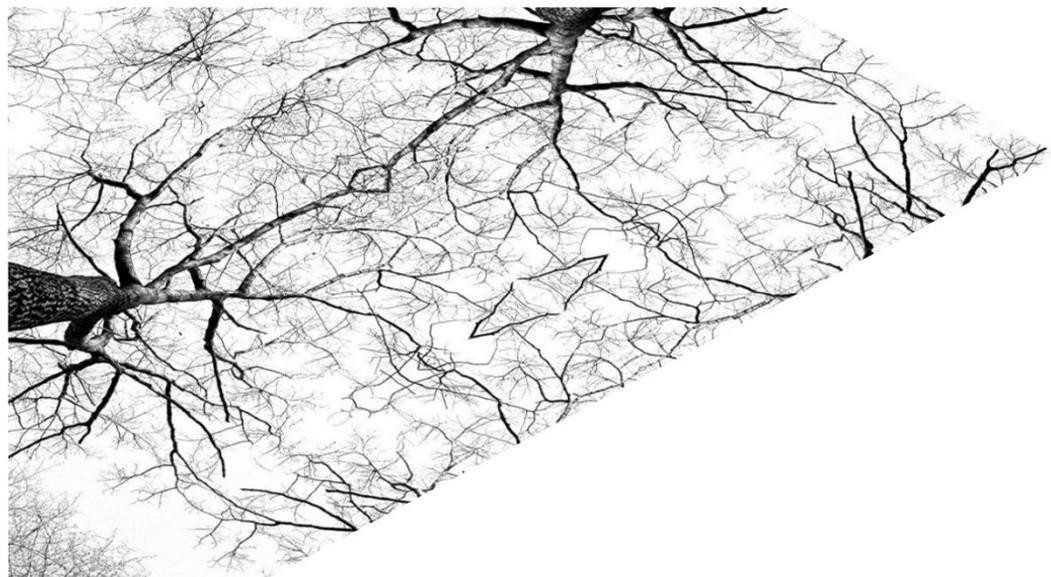
“Meet our Staff” Erasmus week 2025

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Systems & Data Unit
July 2025



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.



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

BOOK
Fundamentals of Psychopathology
Ronald Comer
2025
📖 Not available - In Process >

Get It

OPTIONS: [Request](#) / [Digitize](#) / [Order outside ULiège \(ILL\)](#)

< Back

LOCATION:

Santé - CHU
Currently unavailable, Libre accès - Livres
(0 of 1 copy available; 1 request)

In process: Acquisition technical services
Prêt de 1 mois

Material Type: Book
Location: Santé - CHU Libre accès - Livres
Barcode: 2422335



Alma Work Orders

- ❑ Staff users can monitor items in process

Resource Request Monitoring (1 - 20 of 168) Cancel

Activity Status : Active | Include Pending Resource Sharing Requests : No | Request Date : Up to three days ago | Workflow Step : In Process | Clear all

	Remberti Dodonaei Mechliniensis medici caesarei Stirpium historiae pemptades sex. sive libri XXX. Request Type: Numérisation patrimoniale ULg ID: 57319466830002321 Creator: MMS ID: 990006311440502321 Pickup Location: Cellule de numérisation Barcode: 709301218	Place in Queue: 0 Call Number: R01453D Request Date: 16/06/2025 Note: plantin Material Type: Book	Workflow Step: In Process Managed By Department: Cellule de numérisation Process Date: 17/06/2025 Expiration Date: 07/07/2025	Cancel Print Slip ...
	Avis d'un avocat au Conseil de Brabant sur le droit de ne pouvoir être arrêté que par loix & sentence Request Type: Patrimoine BGP02 - Atelier de conservation ID: 57319759140002321 Creator: MMS ID: 9923615623702321 Pickup Location: Salle de consultation patrimoniale Barcode: ALMA374560	Place in Queue: 0 Call Number: R17394B Request Date: 16/06/2025 Material Type: Book	Workflow Step: In Process Process Status: Document en attente de diagnostic Managed By Department: Salle de consultation patrimoniale Process Date: 16/06/2025 Expiration Date: 16/06/2026	Cancel Print Slip ...
	S'entraîner en parasito-mycologie Request Type: Acquisition technical services ID: 57319764540002321 Creator: MMS ID: 9923547084902321 Pickup Location: Département Acquisitions & Catalogage BSV02 Barcode: 2506115	Place in Queue: 0 Request Date: 16/06/2025 Material Type: Book	Workflow Step: In Process Process Status: Catalogage Managed By Department: Département Acquisitions & Catalogage BSV02 Process Date: 16/06/2025 Expiration Date: 01/07/2025	Cancel Print Slip ...



Alma Work Orders

- ❑ Items can be processed within a dedicated department

Location ✕

I am physically at:

Santé - CHU - Département Acquisitions & Catalogage BSV02 ▼

In Process Items Scan In Items

1 - 20 of 63

0 rows selected Generate Barcode Done Change Status 🔄 🔧

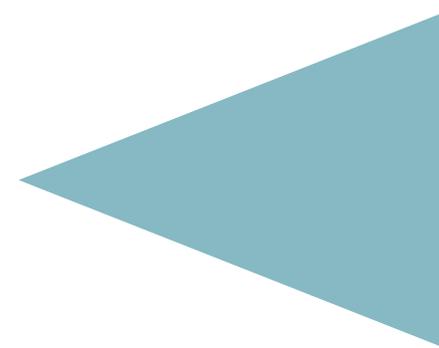
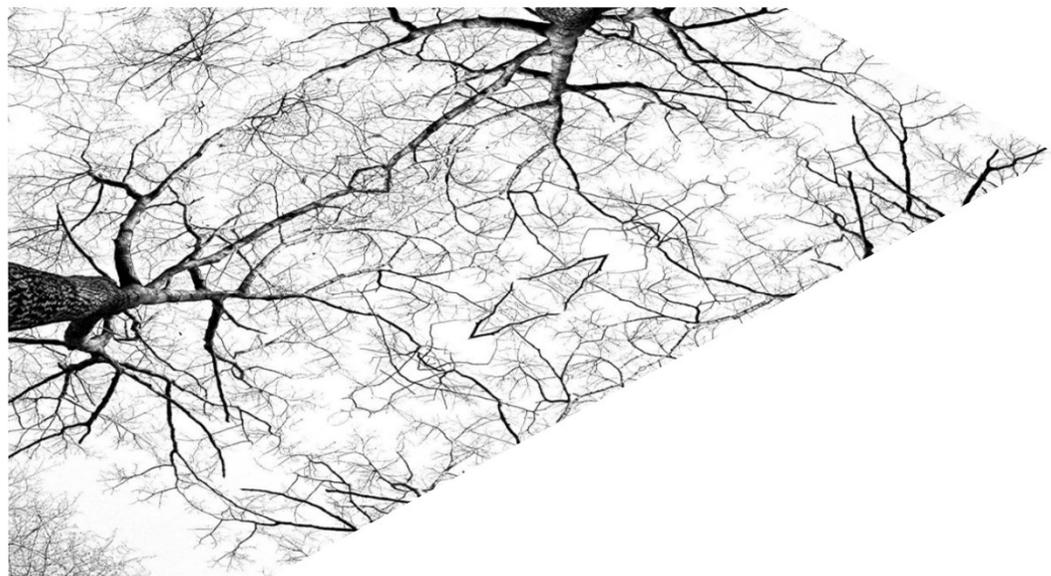
Process Status: All Request Filter: All Library: All Interested Users: All

	<input type="checkbox"/>	Interest ed Users	Date received for department	MMS ID	Title	Library	Status	Barcode	Notes	End of Activity	⋮
1	<input type="checkbox"/>		13/05/2025	9923525401802321	Fundamentals of Psychopathology	Santé - CHU	Catalogage	2422335		28/05/2025	⋮
2	<input type="checkbox"/>	✓	13/05/2025	9923525397202321	Health Psychology: Theory, Research and Practice	Santé - CHU	Catalogage	2422338		28/05/2025	⋮
3	<input type="checkbox"/>		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



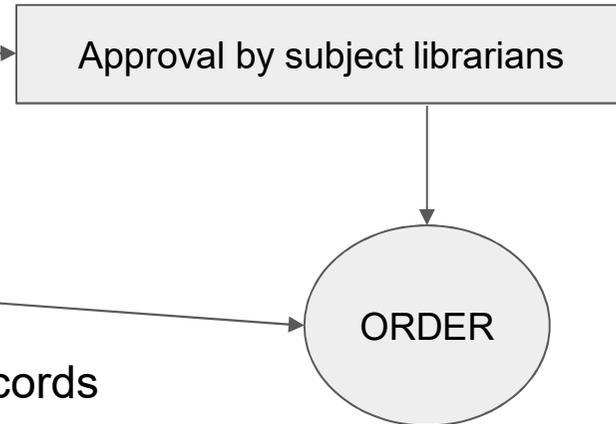
Alma Work Orders

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

Location

I am physically at:

Direction générale et services communs - Département Acquisitions & Catalogage CDA05

Q Search...

Léon Graulich - Accueil L. Graulich

Léon Graulich - Département Acquisitions & Catalogage GRA01

Médecine vétérinaire - Accueil Vété

Médecine vétérinaire - Département Acquisitions & Catalogage BSV04

Philosophie et communication - Accueil PhiCo

Philosophie et communication - Département Acquisitions & Catalogage BGP04

Polytech - Accueil Polytech

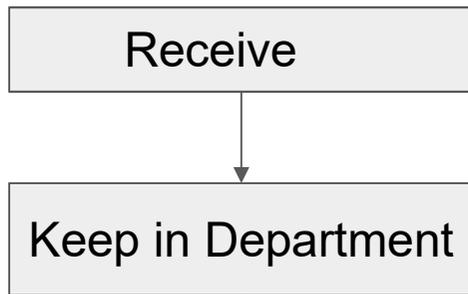
Polytech - Département Acquisitions & Catalogage BST08

Santé - CHU - Accueil Santé - CHU

Santé - CHU - Département Acquisitions & Catalogage BSV02



Acquisitions workflows



Receive New Material

Keep in Department Catalogage Shelf Ready

One Time Continuous

1 - 20 of 1,099 All Filter by vendor Filter by owning library (6 selected)

Status: All (Except Closed) Locate: PO Lines Filter orders with interested users: No Filter orders with patron requests: No

#	Item description	Status	Locations	# Ordered	Items Received
1	POL-117567 Veronese : le storie di Ester rivelate / Giulio Manieri Elia., Venezia ; Marsilio, 978-88-317-0992-7	Sent	Sciences historiques - Aile A - EXTENDED (1)	1	0

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.

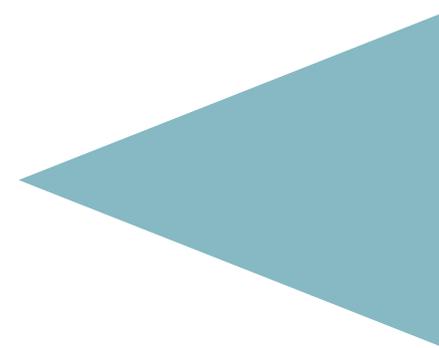
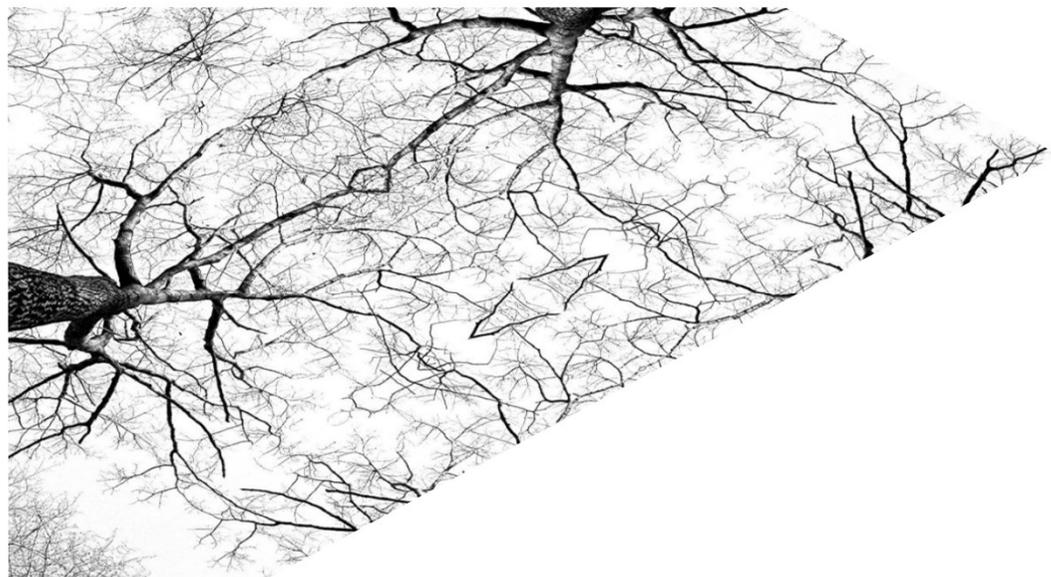


Acquisitions workflows

- ❑ 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



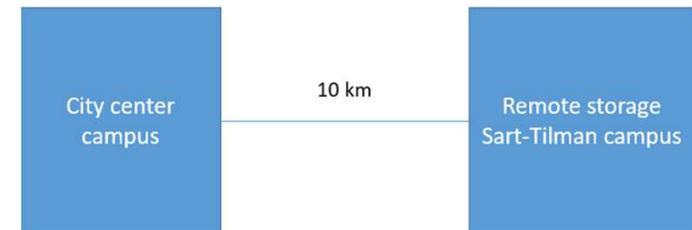
Alma Work Orders

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

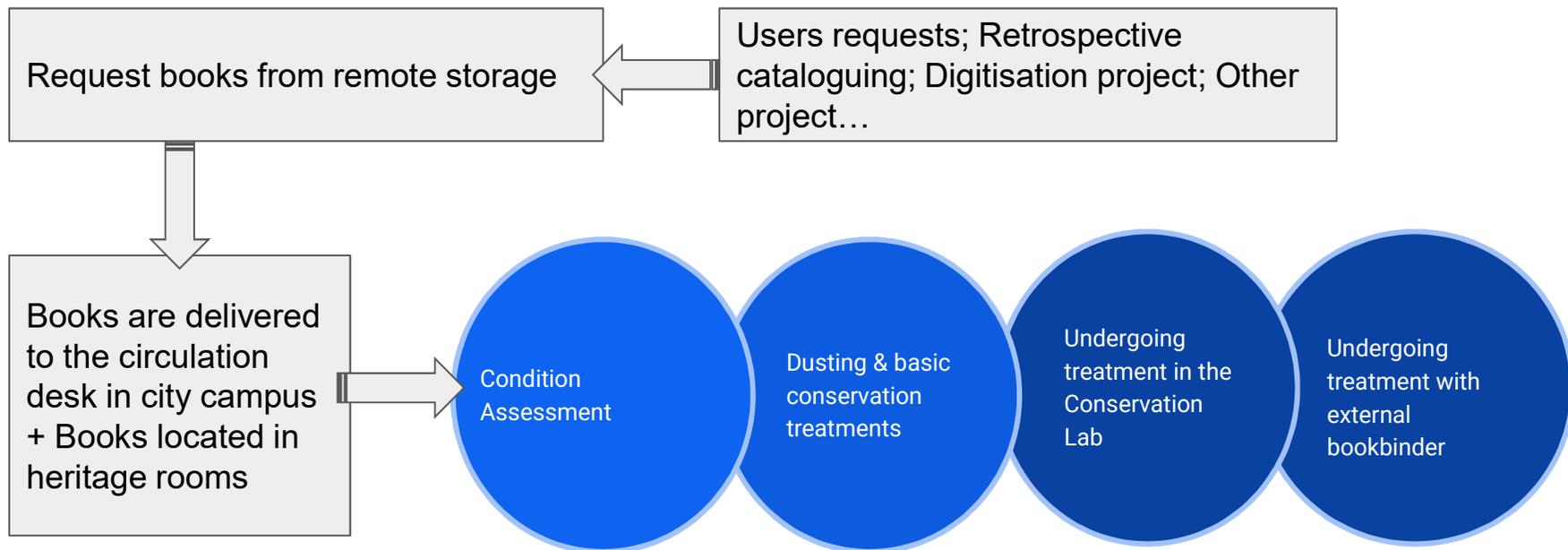
Cataloguing and physical resources management workflows

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 than 11,500 items passed through this workflow (as at june 20)

Cataloguing and physical resources management workflows

❑ Conservation & Binding Work Order



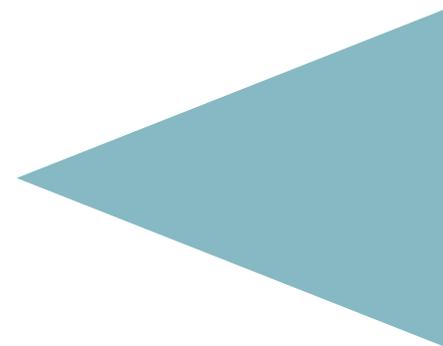
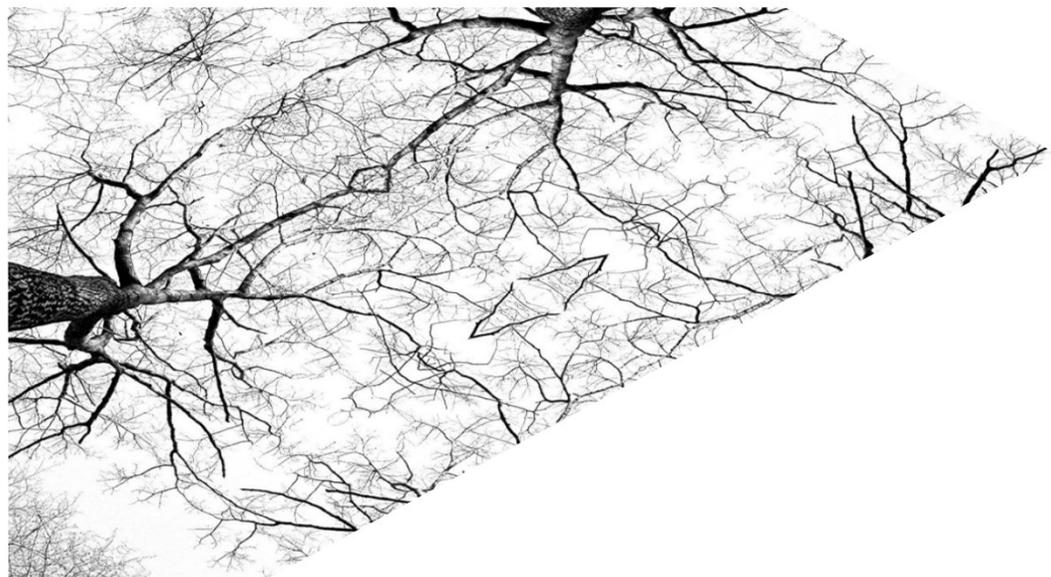
Cataloguing and physical resources management workflows

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



Alma Work Orders

If it were that simple...



Alma Work Orders

... So we always know where the document is

Facets << Resource Request Monitoring (1 - 20 of 2,464)

Type In Process (2464)

Material Type Book (2332) Broadside (1) Bound Issue (27) Issue (46) + More (5)

Workflow Step Transit Item (5)

Activity Status: Active Include Pending Resource Sharing Requests: Yes Request/Process Type: Patrimoine BGP02 - Atelier de conservation

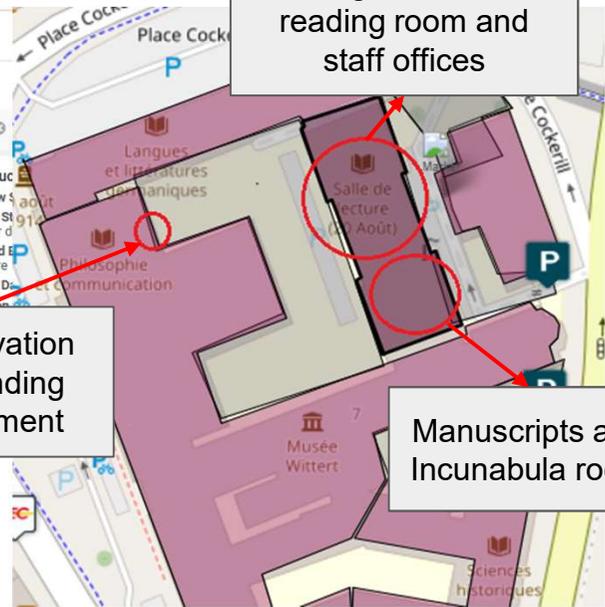
1 Vindiciae contra tyrannos : sive de principis in populum, populique in principem, legitima potestate, Stephano Junio Bruto Celta, auctore
Request Type: Patrimoine BGP02 - Atelier de conservation
ID: 2073333870002321
Call Number: R3576A
Request Date: 22/05/2015
Material Type: Book
MMS ID: 990005489940502321
Pickup Location: Accueil et salle de lecture
Barcode: 709504633



Conservation and Binding Department

Heritage collections reading room and staff offices

Manuscripts and Incunabula room



Alma Work Orders



... We always know when the document will be available

Facets << < Resource Request Monitoring (1 - 20 of 2,464) Cancel

Activity Status: Active Include Pending Resource Sharing Requests: Yes Request/Process Type: Patrimoine BGP02 - Atelier de conservation Clear all

1 **Vindiciae contra tyrannos : sive de principis in populum, populique in principem, legitima potestate, Stephano Junio Bruto Celta, auctore.** Cancel Print Slip ...

Request Type: Patrimoine BGP02 - Atelier de conservation **Place in Queue:** 0 **Workflow Step:** In Process
ID: 2073333870002321 **Call Number:** B3576A **Process Status:** Document en traitement à l'atelier de conservation
Creator: ... **Request Date:** 22/05/2015 **Managed By Department:** Accueil et salle de lecture
MMS ID: 990005489940502321 **Material Type:** Book **Process Date:** 22/05/2015
Pickup Location: Accueil et salle de lecture **Expiration Date:** 31/12/2016
Barcode: 709504633

Du chant / Reynaldo Hahn.

Request Type: Reliure courante **Place in Queue:** 0 **Workflow Step:** In Process
ID: 12016555470002321 **Call Number:** C.0/HAH **Managed By Department:** Accueil ROM
Creator: ... **Request Date:** 25/08/2017 **Process Date:** 25/08/2017
MMS ID: 990017982780502321 **Material Type:** Book **Expiration Date:** 23/12/2017
Pickup Location: Accueil ROM

Lettres à M. le Duc de Blacas d'Aulps, premier gentilhomme de la Chambre, pair de France, etc., relatives au Musée royal égyptien de Turin ; par M. Champollion le Jeune. Première[-seconde] lettre. Monuments historiques.

Request Type: Catalogage retrospectif **Place in Queue:** 0 **Workflow Step:** In Process
ID: 21599173950002321 **Call Number:** XXI.050.006 **Managed By Department:** Departement Catalogage retrospectif
Creator: ... **Request Date:** 02/10/2019 **Process Date:** 15/10/2020
MMS ID: 9920027072902321 **Note:** Cécile L (Eg) **Expiration Date:** 14/11/2020
Pickup Location: Departement Catalogage retrospectif **Material Type:** Book
Barcode: ALMA222649



Alma Work Orders

The screenshot displays the Alma Work Orders interface. On the left, a sidebar shows the title 'The Ottoman Scientific Heritage' and a filter for 'Physical (1)'. A red circle highlights a shopping cart icon in the top right of the sidebar. The main area shows a list of three items with the following details:

Item ID	Barcode	Process Type	Receiving Date	Description
23238544650002321	2407993	Acquisition technical services (CATA)	03/04/2024	Volume 2.2 / Description v.2.2
23238544640002321	2407992	Acquisition technical services (CATA)	03/04/2024	Volume 2.1 / Description v.2.1
23229819220002321	2407991	Acquisition technical services (CATA)	03/04/2024	Volume 1 / Description v.1

Additional details for the first item include 'Sciences de l'Antiquité' and 'unassigned location'. The interface includes navigation buttons like 'Push to MDE', 'Add To Reading List', 'Request', 'Order', 'View Record', 'Edit Record', and 'Display In Discovery'.

What's the most complicated?

Ottoman Heritage or Cataloguing?



Alma Work Orders

Sur le Haut-Congo
Coquilhat, Camille, 1853-1891
1888
● Disponible : BST-Sciences appliquées & Mathématiques - Réserve compactus BST (R50-A2 AFR:OC:CO:10) et autres emplacements

Où trouver le document? + d'infos Etagère virtuelle

ULg Library S'identifier pour demander / commander via le PIB Actions

Google Books

	Disponibilité	Où?
BST-Sciences appliquées & Mathématiques Réserve compactus BST R50-A2 AFR:OC:CO:10	(1 exemplaire, 1 disponible)	?
ALPHA-Bibliothèque principale Réserve distante - Section A XXIII.204.53	(1 exemplaire, 0 disponible)	?

Où trouver le document? + d'infos Etagère virtuelle

ULg Library S'identifier pour demander / commander via le PIB Actions

Google Books

ALPHA-Bibliothèque principale Réserve distante - Section A + d'infos
XXIII.204.53

Code-barres	Type	Description	Statut
709303477	Livre	1 - 1 de 1 exemplaire(s)	Utilisé en Numérisation ULg jusqu'au 26/05/2015

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

LOCATION:

Site central 20-Août

Currently unavailable , Réserve distante - Section Fonds patrimoniaux ; - Cote : R3576A
(0 of 1 copy available; 1 request)

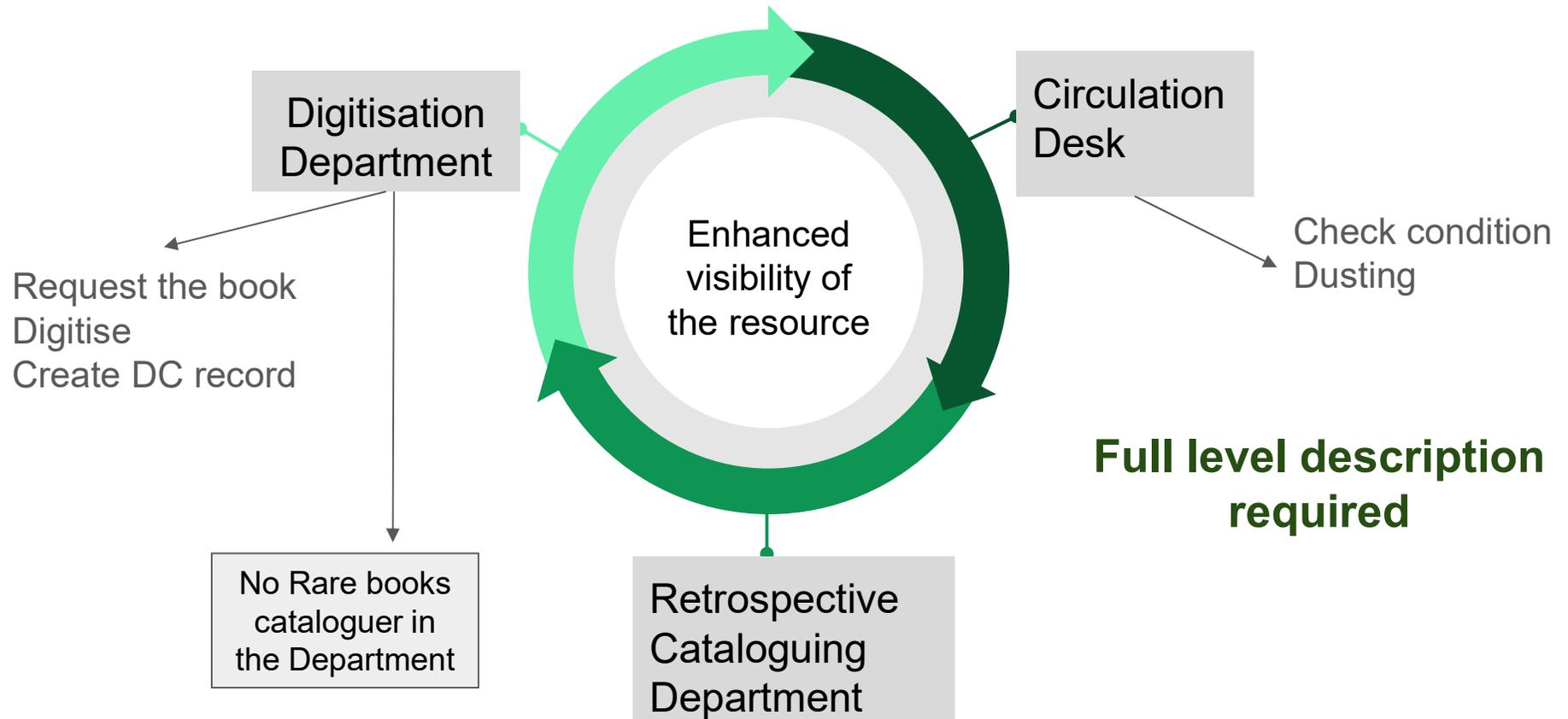
Source of acquisition: Legs...

[View more](#)

In process: Patrimoine BGP02 - Atelier de conservation



Alma Work Orders





Alma Work Orders

- ❑ 2 work orders
- ❑ Different teams
- ❑ Different skills

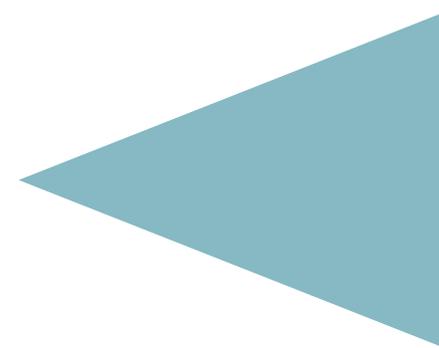
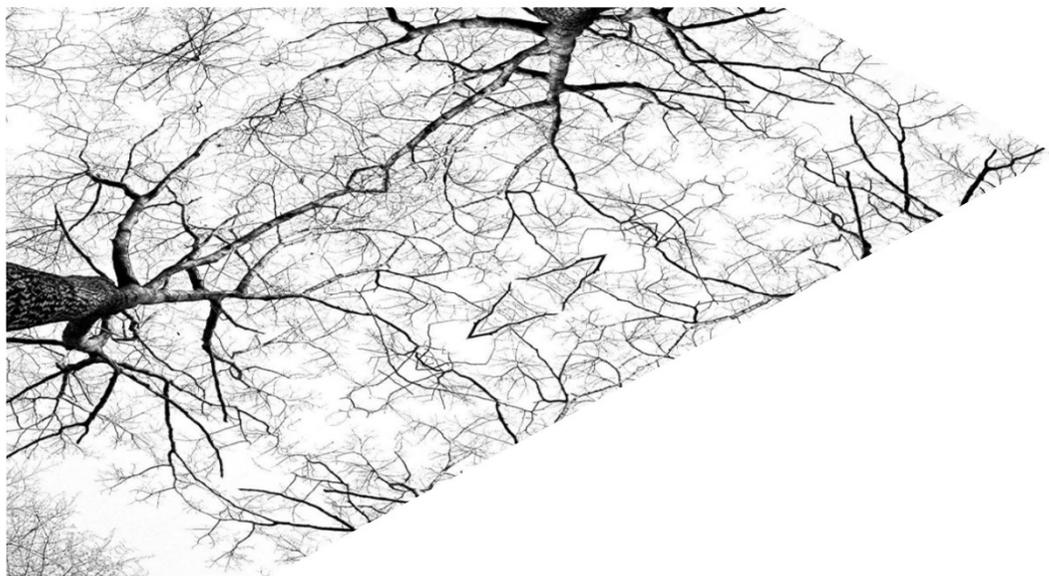
I'll send you a mail and drop the book on your desk.

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



Alma Reminders



Reminders on bibliographic titles

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

< List of Reminders Back

Institution

41 - 60 of 469 Add Reminder

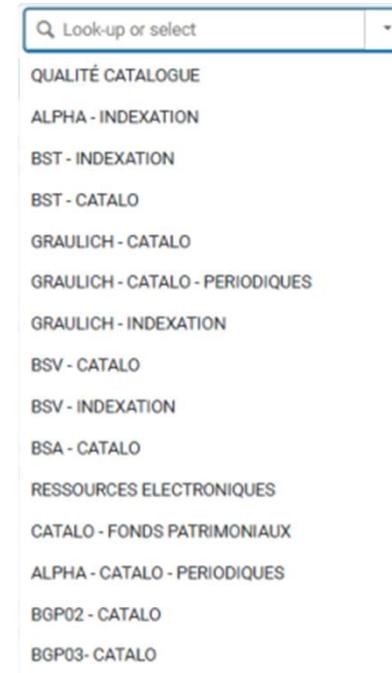
Type: All Status: All Submit Date Range: 13/06/2020 - 23/06/2025

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 brewaews, 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-tārikhī lil-lughah al-'Arabīyah / Ittiḥād al-Majāmi' al-Lughawīyah al-'Ilmiyah al-'Arabīyah, Majma' al-Lughah al-'Arabīyah bi-al-Shāriqah. Majma' al-Lughah al-'Arabīyah (Shāriqah, United Arab Emirates), auteur Manshūrāt al-Qāsīmī, 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

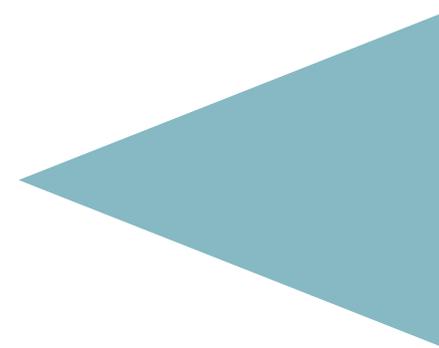
Type	Date	Status	Title	Entity ID	Text	Created By	Modified By
NUMERISATION PATRIMOINE AVANT 1830	23/06/2025	Catalo Alma à revoir	Manipulus theologiae moralis de sacramentis, cum resolutione difficultatum circa illa in praxi occurrentium, de Censuris, Casibus Papae, & Episcopo reservatis, cum dilucida eorum explicatione Manigart, Jean Henri religieux 1615?-1682, auteur Leodii Ex officina Typographica Viduae Balduini Bronckart, [Liège] : 1660	9900051571705023...	-	U215383	U215383
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
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 dignis suae aetatis hominibus accepit, breuiter atque dilucidè describuntur, ex Hebraico Latino factum Bened. Aria Montano interprete. Benjamin de Tudèle, 1130?-1173, auteur Antverpiae, ex officina Christophori Plantini, architypographi regii. M.D.LXXV, [Anvers] : 1575	9922170615502321	PLANTIN	U204582	U213763
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
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

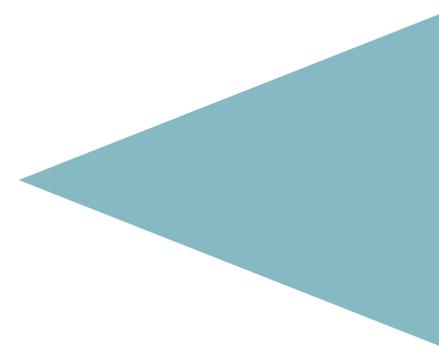
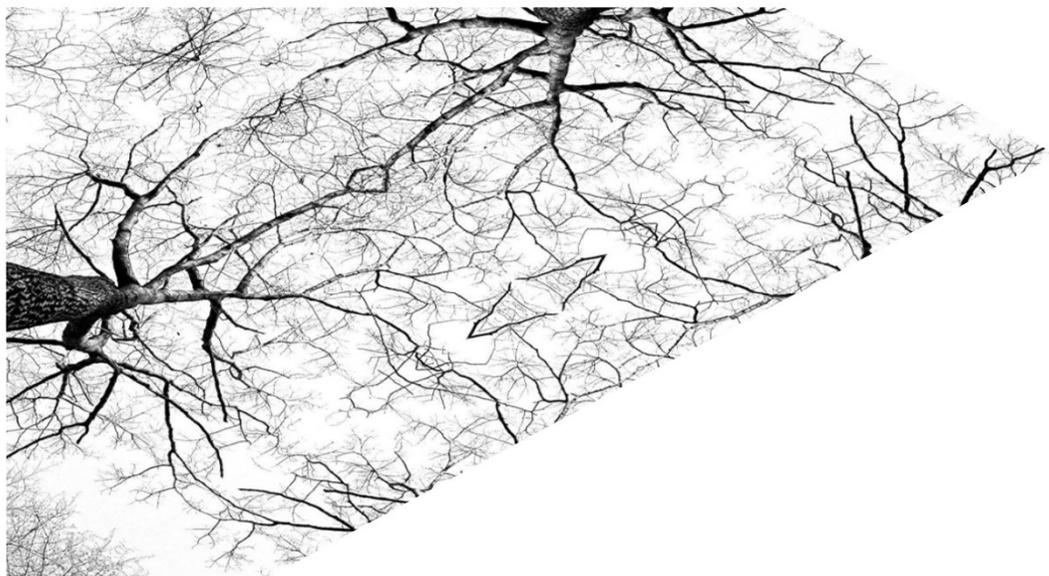


**Think again about our
Alma-Donum integration**



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

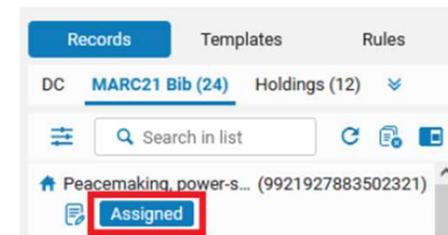
Assigning records

- ❑ 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

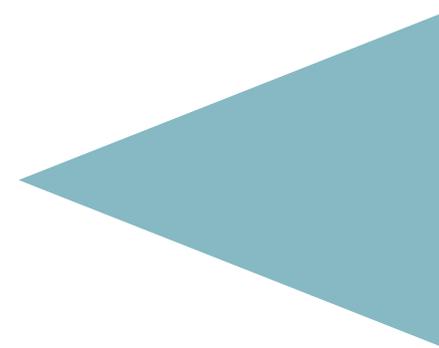
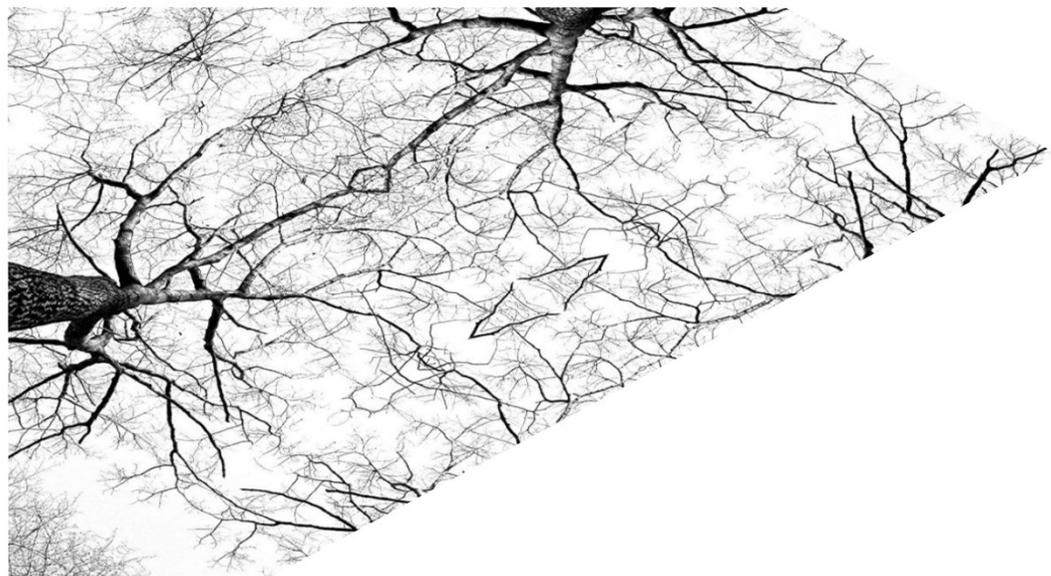
❑ In his/her Metadata editor, a new record will be listed:



❑ 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)



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



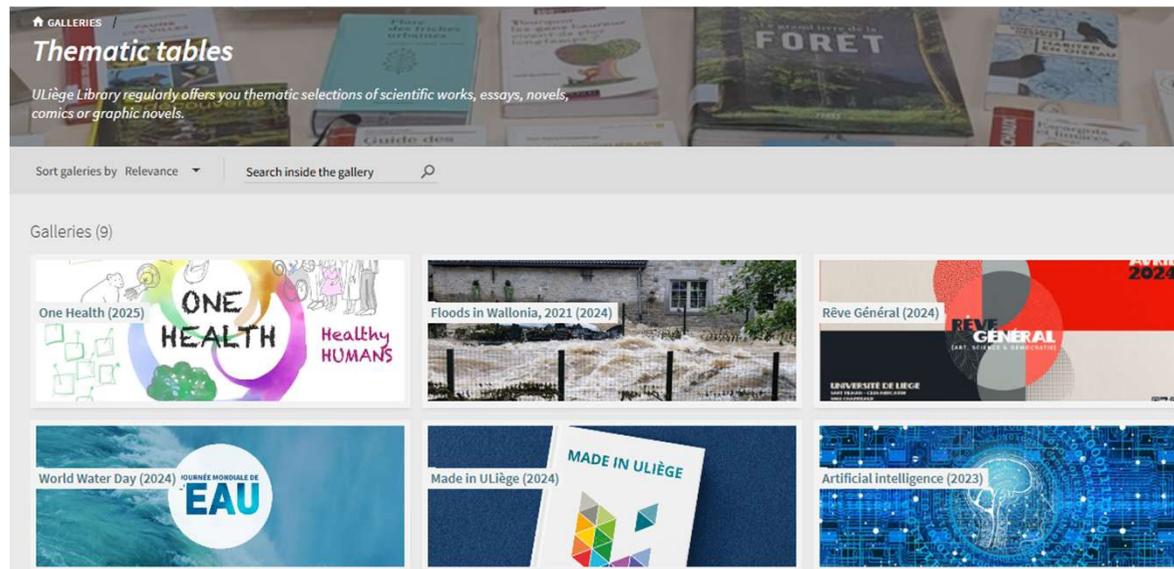
Move functionalities now

- ❑ 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.

Create Request

Request Type * Move temporarily

Note

To * Polytech

Additional Request Attributes

Destination Locations Table thématique - REGULAR

Call Number Type

Call Number

Item Policy

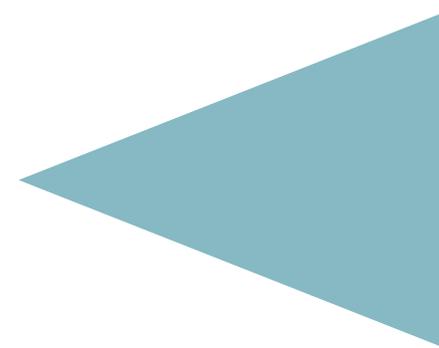
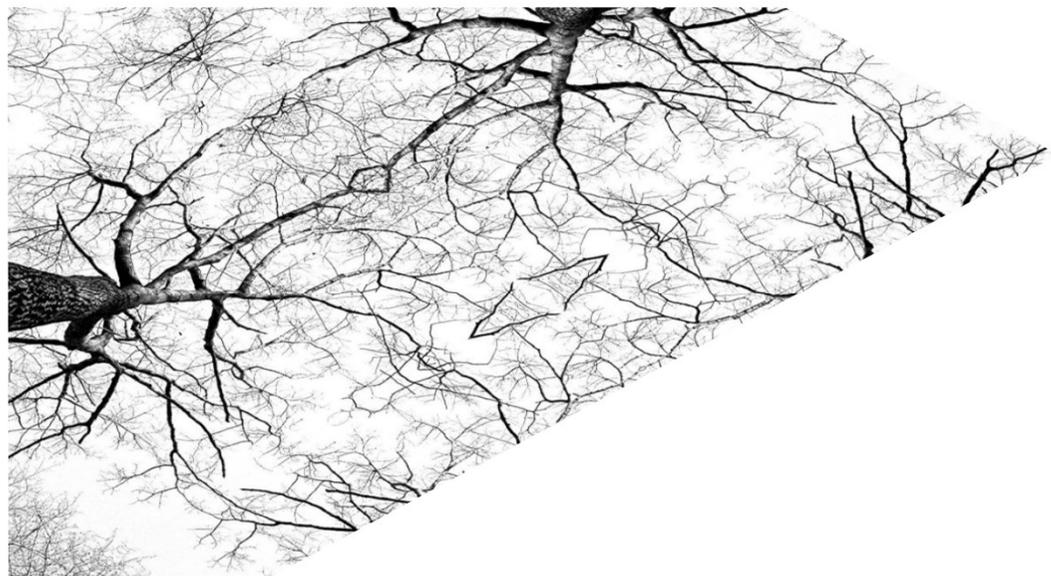
Manual Priority

Due Back



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

Resource Request Monitoring (1 - 20 of 5,264)

Type	▼
Request (1191)	
In Process (4073)	
Material Type	>
Workflow Step	▼
Digitize Item (4)	
Pickup From Shelf (54)	
On Hold Shelf (86)	
Transit Item (883)	
Undefined (287)	
In Process (3950)	
- Less	
Request/Process Type	
Acquisition te... (888)	▼
Catalogage retro... (290)	
General digitization... (5)	
General hold request (3)	
+ More (11)	
Request Date	▼
Today (143)	
Yesterday (152)	
Up to three days a... (13)	
Up to a week ago (316)	
Up to a month ago (753)	
Older (3887)	
- Less	

