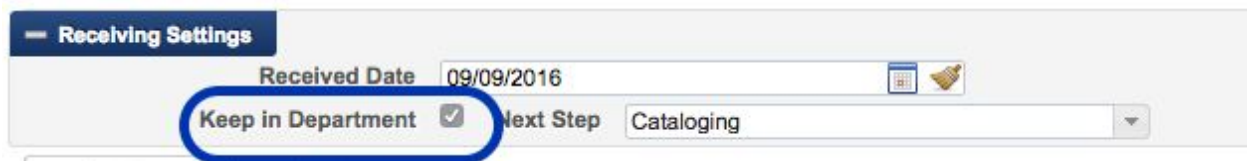# Post-Receiving Processing of Physical Materials using Work Order Overview (WORKING DRAFT September 2016)

Receiving during Invoice Creation

Ensure that your "Currently At" location is set to Oviatt Acquisitions

    I.   Receiving during Invoice Creation (**Alma > Acquisitions > Receiving and Invoicing > Create Invoice)**
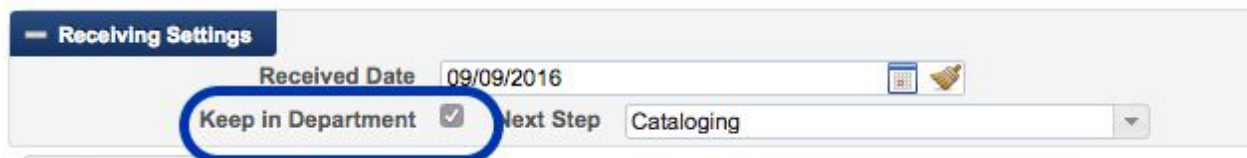   A. Ensure that the **Handle Receiving** checkbox is checked

Alternative: Receive without Invoicing (**Alma > Acquisitions > Receiving and Invoicing > Receive).** Also ensure that the Keep in Department checkbox is checked.

Keep in Department (Work Order)

II. After invoice is created / receiving is complete, route item to its next step using the "**Keep in Department**" checkbox. Ensure the Next Step is set to "Cataloging"

Note that the only work order available in the default "Keep in Department" is the "In Processing" Work order. The name of this department can be changed by us. The name of the Work Order department displays in Primo, but the "step" does not display.

Process New Items in Cataloging

III. Find all items that have the work order "Cataloging" by changing the "Currently At" location to "Oviatt Acquisitions Department." Then and from the Tasks list on the Alma home page, select **Items in Department**.

OR go to **Alma > Acquisitions > Post Receiving Processing > Receiving Department Items**

OR go to **Alma > Fulfillment > Manage In Process Items.**

- To edit items, select **Edit inventory Items** to add barcode or other item information.
- To edit bibliographic records, select **Edit**.
- To update expiry (the date shown in Primo when the work order is expected to be complete and items are expected to be available) select **Update Expiry.**
- To indicate that cataloging is complete, select **Done.** The item status will become "Transit".

Send items for shelving and change item to item in place

Physical items must be scanned once they are ready for shelving to set the status from In Transit to Item in Place.

When the item has been physically carted to the circulation desk that will perform shelving, the circulation operator must have the role "Requests Operator" and must have his/her Currently At location set to the desk that owns the item.

- Go to Fulfillment > Resource Requests > Scan in Items.
- Uncheck the box for "Register in-house use"
- Scan item barcode

The item status will be updated to Item in Place, unless the item has a hold request, in which case it will be placed on the hold shelf.