

Pop-up Collections

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Introduction

These instructions are for libraries who would like to highlight specific items from the University Library's collection on a display.

Note: In order to use these instructions, the requesting library will need a work order department. They will also need to identify which location to use as the display location.

Placing Work Orders

Note: For more detailed instructions, see the “Placing a Work Order” documentation at <https://www.library.illinois.edu/staff/alma/>.

Basic Steps

- Search for the item in the Persistent Search Box.
Note: If you used the “Physical Titles” parameter, click the “Items” link on the right side to get to the list of items.
- Click the “...” button next to the specific item. Select “Work Order” from the drop-down menu.
- Select the appropriate department to send the item to (typically your own department).
- Check or uncheck the “Do not pick from shelf” checkbox, as appropriate:
 - Item in hand: If you have the item with you, the box should be checked.
 - Item on shelf: If the item still needs to be retrieved, make sure the box is unchecked.
- Add a note about the pop-up collection.
- If it didn’t automatically populate, select the Managing Department from the drop-down menu.
- Click “Submit”.
- Repeat this process for each item that will be in the pop-up collection. If you want multiple volumes from a series in the collection, place a Work Order on each volume.

Detailed Workflow

1. Search for the item using the Persistent Search Box at the top of the screen in Alma, and then open the “Place Item in Process” screen. The procedure for this is different depending on if you’re using “Physical Titles” or “Physical Items” as the first parameter.
 - a. For the “**Physical Titles**” parameter, find the appropriate search result and click the “Items” link on the right side.
 - i. Next, find the appropriate item in the list and click the “...” button. Select “Work Order” from the drop-down menu.
 - b. For the “**Physical Items**” parameter, find the appropriate search result and click the “...” button on the item’s record. Select “Work Order” from the drop-down menu.

The screenshot shows the Alma library system interface. At the top, there is a search bar with the text "Physical items" and "Keywords" selected, and the search term "African theatre Layiwola". Below the search bar, there is a navigation bar with "Institution", "Network", and "Community" options. The main content area displays a search result for "African theatre in performance : a festschrift in honour of Martin Banham / edited by Dele Layiwola." with various metadata fields such as "Call Number", "Item ID", "Barcode", "Library", "Creation Date", "Modification Date", "Expected Arrival Time", "On Hold Expiration Date", and "Due Date". A dropdown menu is open next to the item, showing options like "Resource sharing request", "Toggle Missing Status", "Work Order", "Holdings", "Display in Discovery", and "Items". The "Work Order" option is highlighted with an orange box.

2. From the “Place Item in Process” screen, in the “Process Type” field, select the department where you want the item to go for the pop-up collection. This will usually be your own department.
3. Determine if the “Do not pick from shelf” checkbox should be checked.
 - a. **Item in hand:** If you have the physical item with you, the checkbox should have a checkmark.
 - b. **Item on shelf:** If the item still needs to be retrieved from the bookshelves, the checkbox should be empty.
4. Add a note about the pop-up collection in the “Note” field.
5. If the Managing Department hasn’t already been filled in for you, select the Managing Department from the drop-down menu. This is almost always the same as the Process Type.
6. Click the “Submit” button near the top.

The screenshot displays the "Place Item in Process" form. At the top right, there are "Cancel" and "Submit" buttons. The form header shows the item title "African theatre in performance : a festschrift in honour of Martin Banham / edited by Dele Layiwola." and the institution "University of Illinois at Urbana-Champaign (UIU) –Champaign and Urbana, IL". Below this is a section titled "Place Item in Process" which contains:

- Process Type ***: A dropdown menu set to "Teaching, Learning, and Academic Support Work Or".
- Do not pick from shelf**: An unchecked checkbox.
- Note**: A text field containing "For Orange Room Pop Up Collection".
- Managing Department ***: A dropdown menu set to "Teaching, Learning, and Academic Support Work Or".

 At the bottom is an "Additional Request Attributes" section with a "Manual Priority" dropdown menu.

7. Repeat this process for each item that will be in the pop-up collection. If you want multiple volumes from a series in the collection, place a Work Order on each volume you want. The items will be retrieved from the owning library and shipped to your department.

Checking the Item into a Work Order Department

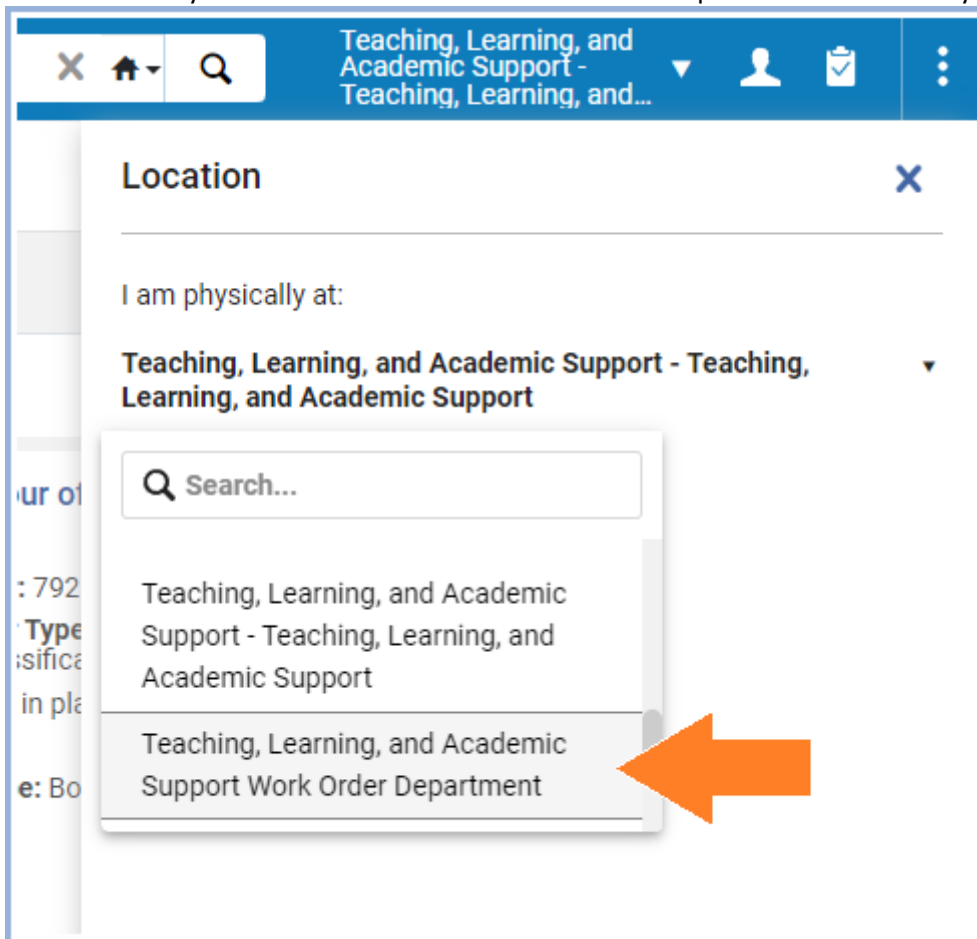
Once the item has been retrieved, it needs to be checked into your library's Work Order Department. It should also be assigned a status to indicate what stage it's at. This makes it easier to locate, especially if it's not going on display immediately.

Basic steps

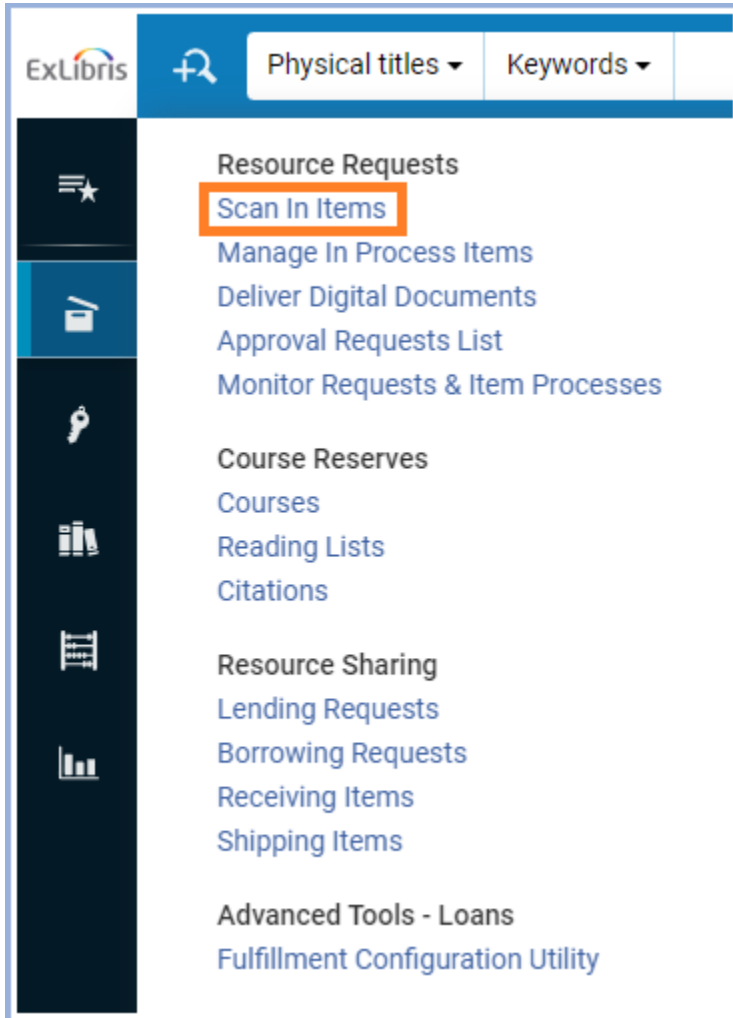
- From the Work Order Department location for your library, go to the "Scan In Items" screen.
- Use the following settings:
 - Set Status To: [The appropriate status for the stage the item is in]
 - Done: No
- Scan in the item barcode.

Detailed Workflow

1. Check that your location in Alma is the Work Order Department location for your library.



2. Go to the "Scan In Items" screen.



3. Use the drop-down menu for "Set Status To" to select the appropriate status.

The screenshot shows the 'Scan In Items' form. At the top right, there are buttons for 'Manage In Process Items' and 'Exit'. Below the title, there are two tabs: 'Scan in Items' and 'Change Item Information'. The 'Automatically print slip' section has radio buttons for 'Yes' and 'No', with 'No' selected. The 'Set Status To' dropdown menu is open, showing three options: 'TLAS - In Process', 'TLAS - On Display', and 'TLAS - Under Review'. The 'Done' label is highlighted with an orange box. Below the dropdown, there are input fields for 'Scan item barcode *' and 'Scan request ID', both with 'Look-up or select' buttons. A 'Create Item' button is on the right. At the bottom, a message says 'No records were found.' with a list icon.

4. The "Done" radio button should be set to "No".

The screenshot shows the 'Scan In Items' form with the 'Done' radio button set to 'No'. The 'Set Status To' dropdown menu is now closed and shows 'TLAS - In Process' selected. The 'Done' label and its radio buttons are highlighted with an orange box. The 'Scan item barcode *' and 'Scan request ID' fields now have 'OK' buttons next to their 'Look-up or select' buttons. The 'Create Item' button is still on the right. At the bottom, the message 'No records were found.' is displayed.

- Scan in the item barcode.
- The Destination should start with “Manage Locally”.

< Scan In Items
Clear List
Manage In Process Items
Exit

Scan in Items
Change Item Information

Automatically print slip Yes No

Set Status To TLAS - In Process ▼

Done Yes No

Scan item barcode * ☰ OK Create Item

Scan request ID OK

1 - 1 of 1 🔗 ⚙️

Title	Destination	Barcode	Request/Process Type	Requester	Requester ID	Place in Queue	Checked In
1 African theatre in performance : a festschrift in honour of Martin Banham / edited by Dele Layiwola.	Manage Locally (Teaching, Learning, and Academic Support Work Orde)	301120...	Teaching, Learning, and Academic Support Work Orde	-	-	1	⋮

Removing the Work Order

Before the item can be put into the pop-up display, the Work Order must be removed.

Basic Steps

- From the Work Order Department location for your library, go to the “Scan In Items” screen.
- Use the following settings:
 - Set Status To: [Any status]
 - Done: Yes
- Scan in the item barcode.

Detailed Workflow

1. Check that your location in Alma is the Work Order Department location for your library.
2. Go to the “Scan In Items” screen.

The screenshot displays the ExLibris Alma interface. At the top, the navigation bar includes the ExLibris logo, search filters for 'Physical titles' and 'Keywords', a home icon, a search icon, and the current department: 'Teaching, Learning, and Academic Support Work Order Department'. A dark sidebar on the left contains icons for various functions. The main content area shows a list of navigation options. The 'Scan In Items' option is highlighted with an orange box. Other options include 'Resource Requests', 'Advanced Tools - Requests', 'Manage In Process Items', 'Advanced Tools - Reading Lists', 'Deliver Digital Documents', 'Citation Alternate Suggestions', 'Approval Requests List', 'Bulk Citation Copyright Recalculate', 'Monitor Requests & Item Processes', 'Process and Enrich Citations', 'Course Reserves', 'Advanced Tools - General', 'Courses', 'Create Fines And Fees Report', 'Reading Lists', 'Create Fulfillment Sets', 'Citations', 'Resource Sharing', 'Lending Requests', 'Borrowing Requests', 'Receiving Items', 'Shipping Items', 'Advanced Tools - Loans', and 'Fulfillment Configuration Utility'. A plus sign icon is visible in the top right corner of the main content area.

- 3. The "Set Status To" field can be set to any status.
- 4. The "Done" radio button should be set to "Yes".

Scan In Items

[Manage In Process Items](#) [Exit](#)

[Scan in Items](#) [Change Item Information](#)


Automatically print slip Yes No

Set Status To **TLAS - On Display** ▼

Done Yes No

Scan item barcode *

Scan request ID



No records were found.

- Scan in the item barcode.
- The Destination should be the owning library, and the Request/Process Type should be "Transit for Reshelving".

< Scan In Items

Clear List
Manage In Process Items
Exit

Scan in Items
Change Item Information

Automatically print slip Yes No

Set Status To TLAS - In Process ▼

Done Yes No

Scan item barcode * ☰ OK Create Item

Scan request ID OK

1 - 1 of 1 🔗 ⚙️

Title	Destination	Barcode	Request/Process Type	Requester	Requester ID	Place in Queue	Checked In
1 African theatre in performance : a festschrift in honour of Martin Banham / edited by Dele Layiwola.	Main Stacks	301120...	Transit For Reshelving	-	-	1	⋮

Changing the Item Location

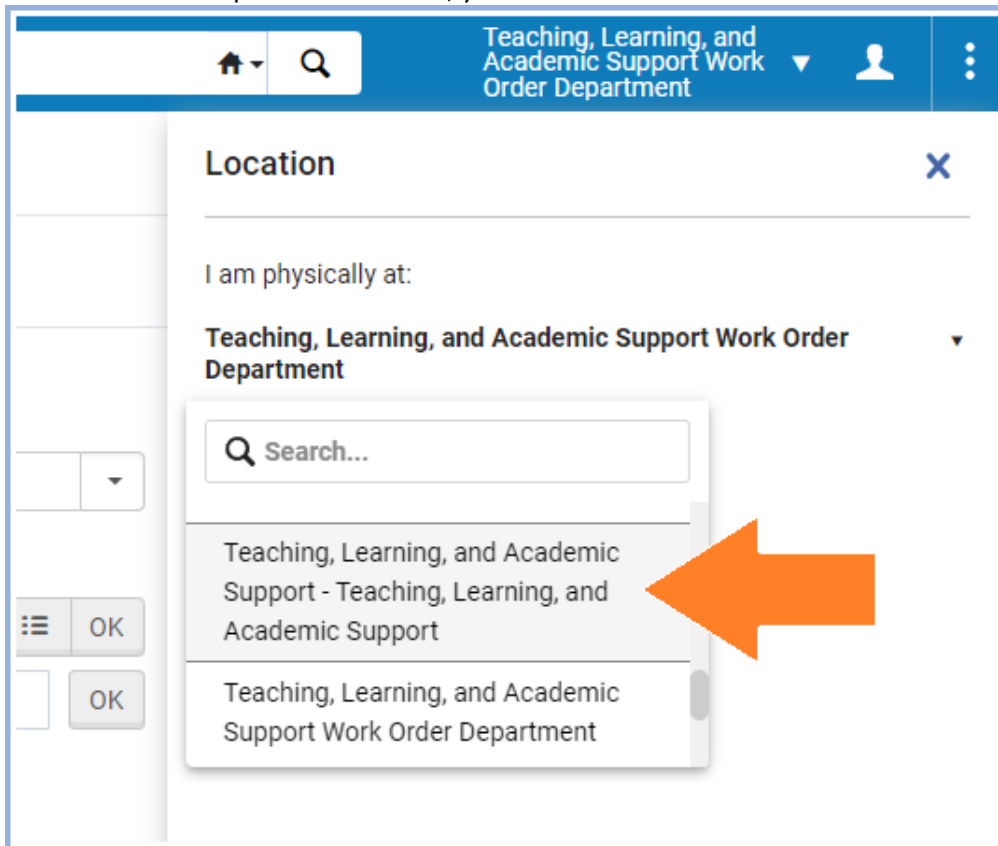
Now that the Work Order has been removed, you can change the item's temporary location to your pop-up collection so the item can be put on display.

Basic Steps

- From the **circulation desk location** for your library, go to the "Scan In Items" screen.
- Select the "Change Item Information" tab.
- Use the following settings:
 - Change Type Field: Temporary
 - Location: [The location your library uses for pop-up collections]
 - Check Requests: Checked
- Scan in the item barcode.

Detailed Workflow

1. Make sure that your location in Alma is the **circulation desk location** for your library. If you're still in the Work Order Department location, you'll add additional Work Orders to the item that will need to be cleared.



2. Go to the "Scan In Items" screen.

The screenshot displays the ExLibris web application interface. At the top, there is a navigation bar with the ExLibris logo on the left, followed by search filters for "Physical titles" and "Keywords", a home icon, and a search icon. On the right side of the navigation bar, a dropdown menu is open, showing "Teaching, Learning, and Academic Support - Teaching, Learning, and...". Below the navigation bar is a vertical sidebar with several icons representing different functions. The main content area is a grid of menu items. The "Scan In Items" option is highlighted with an orange border. The menu items are organized into several sections: Checkout/Checkin, Resource Requests, Course Reserves, Resource Sharing, Advanced Tools - Loans, Advanced Tools - Requests, Advanced Tools - Reading Lists, and Advanced Tools - General.

Section	Item
Checkout/Checkin	Checkout/Checkin
	Manage Patron Services
	Return Items
Resource Requests	Resource Requests
	Pick From Shelf
	Scan In Items
	Expired Hold Shelf
	Active Hold Shelf
	Deliver Digital Documents
	Approval Requests List
Monitor Requests & Item Processes	
Course Reserves	Course Reserves
	Courses
	Reading Lists
Citations	Citations
	Resource Sharing
	Lending Requests
Resource Sharing	Borrowing Requests
	Receiving Items
	Shipping Items
	Advanced Tools - Loans
Advanced Tools - Loans	Fulfillment Configuration Utility
	Offline Circulation
	Advanced Tools - Requests
Advanced Tools - Requests	Items Requiring Action
	Advanced Tools - Reading Lists
Advanced Tools - Reading Lists	Citation Alternate Suggestions
	Bulk Citation Copyright Recalculate
	Process and Enrich Citations
	Advanced Tools - General
Advanced Tools - General	Create Fines And Fees Report
	Create Fulfillment Sets

3. Select the "Change Item Information" tab.

Scan In Items Exit

Scan in Items | **Change Item Information**

Change Type: **Restore** | Scan item barcode * | Look-up or select | OK

Check Requests

No records were found.

4. For the "Change Type" field, select "Temporary".

Scan In Items Exit

Scan in Items | **Change Item Information**

Change Type | Look-up or select | Scan item barcode * | Look-up or select | OK

Change Type dropdown menu:
Permanent
Temporary
Restore

No records were found.

5. Select a temporary location for the item. If you don't have a location listed that includes the term "Pop-Up Collection" or something similar, then check with a supervisor to see which location you should use instead.

< Scan In Items Exit

Scan in Items Change Item Information

Change Type **Temporary** ▼ Due Back

Location * ▼ Item Policy ▼

Call Number Type **Pop-Up Collection** Call Number

Reading List Teaching, Learning, and Academic Sup

New Barcode UNASSIGNED location

Scan item barcode *

Check Requests

No records were found.

- 6. The "Check Requests" checkbox should have a checkmark.
- 7. Scan in the item barcode.

Scan In Items Exit

Scan in Items | Change Item Information

Change Type: **Temporary** | Due Back:

Location *: **Pop-Up Collection** | Item Policy:

Call Number Type: | Call Number:

Reading List:

New Barcode:

Scan item barcode *:

Check Requests

No records were found.

8. The Destination should be “Reshelve”, and the Location should be the temporary location you selected earlier.

< Scan In Items
Clear List
Exit

Scan in Items

Change Item Information

Change Type Temporary ▼

Location * Pop-Up Collection ▼

Call Number Type ▼

Reading List ☰

New Barcode

Scan item barcode * 🔍 Look-up or select ☰ OK

Check Requests

Due Back 📅

Item Policy ▼

Call Number

1 - 1 of 1

Change Type	Title	Destination	Barcode	Location	Call Number Type	Call Number	Item Policy	Due Back
Temporary	African theatre in performance : a festschrift in honour of Martin Banham / edited by Dele Layiwola.	Reshelve	30112059443...	Pop-Up Collection	-	792.096 Af834	-	-

9. Put the item out on display in the pop-up collection. It can now be checked out to patrons and checked back in to the pop-up collection as normal.

Returning the Item to its Original Location

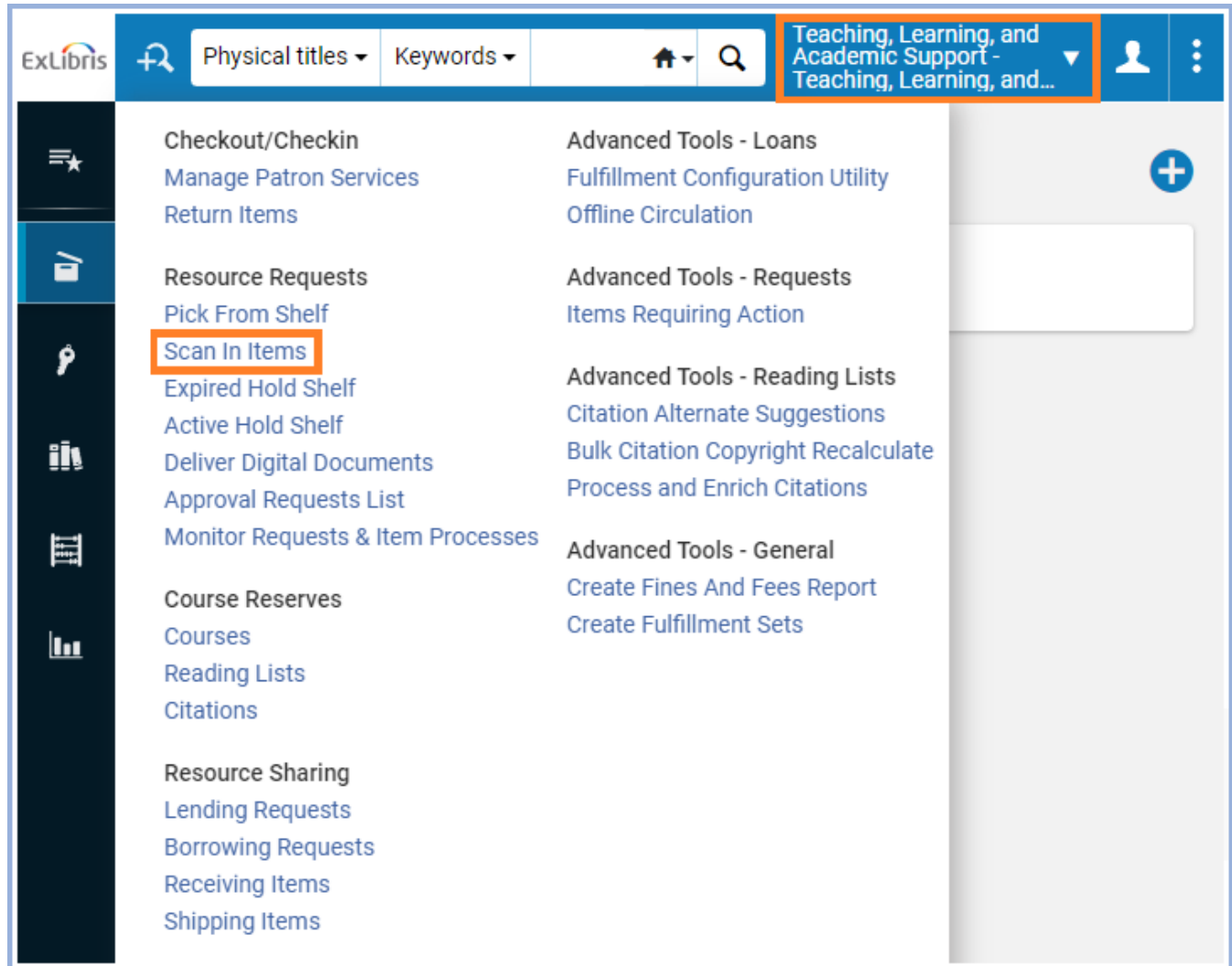
Once the pop-up collection is over, the items need to have their original location restored in Alma so they can be routed back to the owning library.

Basic Steps

- From the circulation desk location for your library, go to the “Scan In Items” screen.
- Select the “Change Item Information” tab.
- Use the following settings:
 - Change Type Field: Restore
 - Check Requests: Checked
- Scan in the item barcode.
- Print the Routing Slip, put it in the item, and send the item to the owning library via Shipping.

Detailed Workflow

1. Make sure that your location in Alma is the circulation desk location for your library.
2. Go to the “Scan In Items” screen.



- 3. Select the "Change Item Information" tab.
- 4. For the "Change Type" field, select "Restore".

Scan In Items Clear List Exit

Scan in Items Change Item Information

Change Type ▼

- Location * Permanent
- Call Number Temporary
- Restore**

Due Back 📅

Item Policy ▼

Call Number

New Barcode

Scan item barcode * ☰ OK

Check Requests

- 5. The "Check Requests" checkbox should have a checkmark.
- 6. Scan in the item barcode.

Scan In Items Clear List Exit

Scan in Items Change Item Information

Change Type **Restore** ▼

Scan item barcode * ☰ OK

Check Requests

7. Alma will print a Routing Slip. Put the slip in the item.

The screenshot displays the Alma print interface. On the left, a routing slip is shown with the following details:

- Time: 3/8/24, 3:50 PM
- Action: Scan in Items
- To: Main Stacks
- Item Barcode: 3 0 1 1 2 0 5 9 4 4 3 5 2 0
- Title: African theatre in performance : a festschrift in honour of Martin Banham / By: Layiwola, Dele.
- Owning Library: Main Stacks
- Logos: CARLI and I-Share
- URL: <https://i-share-uu.alma.exlibrisgroup.co...>
- Page: 1/1

On the right, the print settings are configured as follows:

- Print: 1 sheet of paper
- Destination: LIBPRNCIR08
- Pages: All
- Copies: 1
- Layout: Portrait
- Color: Black and white
- More settings: (dropdown arrow)
- Buttons: Print, Cancel

8. The Destination should be the library where the item came from.

The screenshot shows the 'Scan In Items' interface. At the top, there is a back arrow, the title 'Scan In Items', and buttons for 'Clear List' and 'Exit'. Below this, there are two tabs: 'Scan in Items' (active) and 'Change Item Information'. A 'Change Type' dropdown is set to 'Restore'. To the right, there is a 'Scan item barcode *' field with a search icon and the text 'Look-up or select', followed by a menu icon and an 'OK' button. Below the search field, there is a 'Check Requests' checkbox which is checked. The main content area shows '1 - 1 of 1' items. A table with the following columns is displayed: Change Type, Title, Destination, Barcode, Location, Call Number Type, Call Number, Item Policy, and Due Back. The 'Destination' column for the first item is highlighted with an orange box and contains the text 'Main Stacks'. The first item's details are: Change Type: Restore; Title: African theatre in performance : a festschrift in honour of Martin Banham / edited by Dele Layiwola.; Destination: Main Stacks; Barcode: 3011205...; Location: Stacks; Call Number Type: Dewey Decimal classific...; Call Number: 792.096 Af834; Item Policy: -; Due Back: -.

Change Type	Title	Destination	Barcode	Location	Call Number Type	Call Number	Item Policy	Due Back
Restore	African theatre in performance : a festschrift in honour of Martin Banham / edited by Dele Layiwola.	Main Stacks	3011205...	Stacks	Dewey Decimal classific...	792.096 Af834	-	-

9. Follow your usual procedure to send the item there through Shipping.