Configuring Physical Item Sort Routines

Users with the following roles can configure physical item sort routines:

- General System Administrator
- Repository Manager
- Purchasing Manager
- Purchasing Operator
- Physical Inventory Operator

If the user does not have the role General System Administrator or Repository Administrator, the user must also have one of the following roles:

- API Label Printing Read
- Catalog Administrator
- Depositing Administrator

Introduction

The Physical Item Sort Routines configuration options provide greater flexibility for determining the sort order display of physical items in the Received Items List (**Acquisitions > Receiving and Invoicing > Receive > Continuous tab**, select **Manage Items** from the row actions list), the staff search physical items list, and/or the items list in Primo Get It. These configuration options enable you to create your own custom sort routines in addition to the default sort routines provided with Alma.

On the Received Items List page, you can switch from one sorted view to another by selecting a sort routine from the drop-down list. See below for an example.
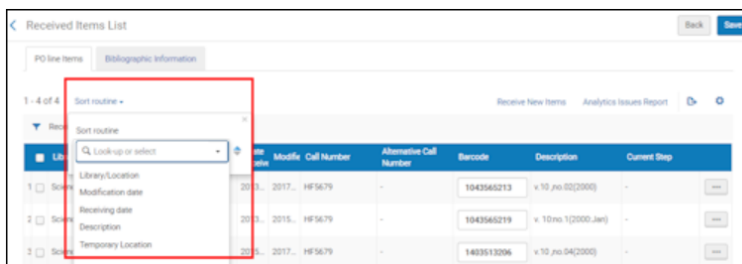
Received Items List - Sort Routines Drop-Down List

To the right of the drop-down list, up/down arrows enable you to switch between ascending and descending order for the sort routine that you selected.

For more information on item sort routines, see the Item Sort Routines video (7:34 min.).
For more information regarding a chronological sort configuration, see the Sort Physical Items Chronologically video (3:11 min.).

Creating a Physical Item Sort Routine

To create new item sort routines:

1. On the Sort Routine List page (**Configuration Menu > Resources > General > Physical Item Sort Routines**), select **Add sort routine**. The first step of the sort routine wizard opens.

2. Enter the name and description for the sort routine and select **Next**. Step 2 of the sort routine wizard opens.

3. Select the sort order (ascending or descending) for this routine.

4. Select one or more of the following fields that you want to use to sort physical items:

   - Chronology I (year)

   - Chronology J (month)

   - Chronology K (day)

   - Description

   - Enumeration A (volume)

   - Enumeration B (issue)

   - Enumeration C (part)

   - Library

   - Location

   - Material type – This field is applicable only to the list of items that appear in the staff search physical items list.

   - Receiving date

   - Temporary location

5. Select **Add to Selection**. The fields that you selected appear in the **Sorts selected** section.

Sort Fields Selected

6. Use the up/down arrows to the left of the selected fields to identify the order in which you want these fields sorted and select **Next**. Step 3 of the sort routine wizard opens.

7. Select the item list in which you want this sort routine to be available and select whether it should be the default sort routine to be used.

Sort Routine Available For Selection

Note

The **Resource management Get It results** option enables you to define various sort routines that can be used for Primo/Primo VE, but only the routine that is marked as the default will be used. Users are not given an option to select another sort routine in Primo/Primo VE.

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8. Select **Save**. The new sort routine is added to the list of routines on the Sort Routine List page.

Editing a Physical Item Sort Routine

To edit item sort routines:

1. On the Sort Routine List page (**Configuration Menu > Resources > General > Physical Item Sort Routines**), select **Edit** from the row actions list in the row of the sort routine that you want to edit. The **General Information** tab on the Sort Routine List page appears.

2. Select the **Conditions Selection** tab and/or the **Display Options** tab and make the changes needed to match your requirements. Refer to the procedure To create new item sort routines: for details regarding the sort routine options.

3. When you have finished making your changes, select **Save**.

Deleting a Physical Item Sort Routine

To delete item sort routines:

On the Sort Routine List page (**Configuration Menu > Resources > General > Physical Item Sort Routines**), select **Delete** from the row actions list in the row of the sort routine that you want to delete.