

Work Orders

Work orders are a flexible tool that allow you to monitor the processing of physical items in your library.

A few examples of instances where work orders are can be used:

- Track the repair of damaged items
- Perform additional cataloging once an item received from a vendor
- removing specific books from the shelf for collection analysis/weeding

In a small library where one person performs multiple functions work orders can still be a useful tool to indicate where an item has gone when an item is not on the shelf. In this case the work order statuses should be much more general (perhaps even configuring one status per work order type) so one person doesn't have to scan the item repeatedly to update the status while working on an item.

Work Order statuses can be configured to be as specific or as general as you like, though I advise against making them too granular as it may make the process of using work orders overly cumbersome. Work order statuses are not prescriptive - there are no specific steps that must be taken for each type of work order.

Configuring Work Orders

Breadcrumbs: Administration > General Configuration > Configuration Menu > Work Orders and Departments > Work Order Types

Role required: General System Admin

- Add a work order type – overall designation of the process to be performed. For example, Cataloging or Repair.
- Add Statuses to the work order type – Statuses describe the individual step of the work order process. For example, Physical Processing or Waiting for Approval.

Breadcrumbs: Administration > General Configuration > Configuration Menu > Work Orders and Departments > Work Order Departments

Role required: General System Admin

- Add departments associated with the work order type – Departments are the areas in the library that handle the work order. Departments can be scoped to the institution or an individual library.
- Add work order operators – Operators are the specific users who handle the work order. Only operators can see and edit the work order once it is created. When an operator is designated in configuration they are automatically assigned the Work Order Operator role.

For details see Online Help (OLH) Topic [Work Orders and Departments](#).

Linking work orders to the Circulation Desk

Regular work order steps involve transiting materials from one department to another which means you need to set the item in transit and scan the item upon arrival in the next department. Once the work order is completed it needs to be transited back to the circulation desk for re-shelving and scanned in once more at the circulation desk. If the process of transiting from one department to another is cumbersome you may want to consider configuring the circulation desk as the work order department to avoid the need for transiting.

Examples of when you would want to apply this configuration:

- Your library is physically small with little distance between departments
- One person performs all the steps in a particular work order
- This work order is actually handled in the circulation department
- Your institution does not return items to the circulation desk for re-shelving (for example: items go straight from the bindery to the shelf)

For step by step instructions to configure this see the Knowledge Center Article [Create Work Order linked to the Circulation Desk](#).

Workflow Overview

(see workflow diagram Work Orders v.1)

1. Work order created
2. Item on shelf?
 - If yes: proceed to 5
 - If no: proceed to 3
3. Item checked out to patron?
 - a. If yes: once item is returned proceed to step 6
 - If no: proceed to 4
4. Item recently received?
 - If yes: proceed to 6
 - a. If no: item missing. Refer to lost/missing item procedure.
5. Retrieve Item from shelf
6. Transit item to work order department
7. Work completed in work order department
8. Item transited to shelving unit and re-shelved

Create work order

Role Required: Requests Operator, Purchasing Operator, Purchasing Manager, Electronic Inventory Operator, Repository Manager, Physical Inventory Operator, Fulfillment Services Manager, Fulfillment Services Operator

Note: Roles with the “Requests Creator” privilege can place work order requests. To add the Requests Creator privilege to an another role contact Ex Libris.

An example where you might want to apply this: If students or staff located at check in are assigned the Circ Desk Operator Limited role and they need the

ability to create a work order for damaged books received in the book drop, have Ex Libris assign the Requests Creator privilege to the Circ Desk Operator Limited role.

There are several ways to create work orders, depending on your role and the physical location of the item.

1. Perform a physical item search for the item in Alma. Click the Work Order link.

Note: The Work Order link only appears when doing a physical item search.

Select appropriate work order type from the Request type drop down list

Select the Target destination - where the item should go to be worked on

Check/Uncheck the Do Not Pick from Shelf box. If the item is in hand the box should remain un-checked.

Add notes in the free text box

2. If the Work Order Operator has the item in hand there are two additional methods they can use to create the work order:

- Scan the item in at the Work Order department
 - Select "Currently At" the Work Order Department
 - Navigate to Fulfillment > Resource Requests > Scan in Items
 - Select the appropriate status and scan the item
- Change the process type in the item record
 - Find the item in hand via Repository Search and open the item record
 - General Information tab > select the Process type that corresponds to the work order > Save

3. Once an item is checked out an item to a patron:

On the patron services screen:

Click the Actions button on the line corresponding to the appropriate item

Select Work Order and fill in appropriate Process type and notes. Upon check in the item will transit to the work order department.

4. Work orders are automatically created in the following scenarios, unless configured otherwise:

- During check out: Create Item is selected and a barcode is scanned, creating an "on the fly" item that requires additional cataloging upon return. When the item is returned and scanned in it will automatically transit to the Acquisitions Department to process the work order.
- During Receiving: Keep in Department is checked indicating additional physical processing is required.

5. Creating work orders in bulk:

Breadcrumbs: Administration > Manage Jobs > Run a job > Create physical item work orders

Role required: Fulfillment Services Manager, Fulfillment Administrator

Create a set of the appropriate items.

Run the Create physical item work orders job by using the breadcrumbs above.

Bulk work order creation can be used immediately post-migration to convert notes reflecting Millennium/Sierra item statuses such as Bindery or On search into a work order. For details see ULMS Project Page [Item Statuses in migration to Alma](#).

For more information about creating sets see OLH Page [Managing Search Queries and Sets](#).

For more about running jobs see OLH Page [Running Manual Jobs on Defined Sets](#).

Retrieve the item from the shelf

If the item is “in place” it will appear on the Pick from Shelf list as a result of the work order creation.

Breadcrumbs: Fulfillment > Resource Requests > Pick from Shelf

Role Required: Requests Operator

Check the items you need to retrieve and select Print Slip Report

Use the options that follow to directly print pick slips, export the list to Excel for list manipulation or e-mail the pick list to a specific user.

Note: If, during the course of creating the work order, the “pick from shelf” option was not selected, the request must be cancelled and re-submitted with the option checked. There is no way to add an item to the pick from shelf list outside of creating a request.

Scan items once they are retrieved

Breadcrumbs: Fulfillment > Resource Requests > Scan In Items OR Acquisitions > Post Receiving Processing > Scan In Items

Role Required: Requests Operator

If scanned from the Circulation Desk (or anywhere other than the work order department) the item status will change to in transit and a transit letter is printed. The item should be transited to the work order department.

Process the Work Order

Breadcrumbs: Change Currently At to the work order department, Fulfillment > Resource Requests > Scan In Items

OR Acquisitions > Post Receiving Processing > Scan In Items

Role Required: Work Order Operator

Pick appropriate “Set Status To” value (depending on what is being done to the item) and scan the item barcode.

The item status should now reflect the work order status in Alma and will remain that way until the work order is completed.

If the work order has multiple statuses, the status can be updated by:

1. Repeating the Scan In Items process above and choosing another status
2. Accessing the item in the department task list:

Breadcrumbs: Set Currently At to the work order department
Fulfillment > Resource Requests > Manage In Process Items

OR click on the Items – in department link in the Tasks menu on the Alma homepage

Role Required: Work Order Operator

Click Actions, select Edit. Pick a new status from the dropdown menu available.

Complete the work order

There are two ways to signal to Alma that a work order is finished:

1. Use Scan In Items

Breadcrumbs: Change Currently At to the work order department
Fulfillment > Resource Requests > Scan In Items

OR Acquisitions > Post Receiving Processing > Scan In Items

Role Required: Work Order Operator

Choose the “Yes” radio button next to “Done” and scan the item barcode.

2. Access the item in the department task list:

Breadcrumbs: Set Currently At to the work order department
Fulfillment > Resource Requests > Manage In Process Items

OR click on the Items – in department link in the Tasks menu on the Alma homepage

Role Required: Work Order Operator

Click Actions, select Done.

To finish multiple work orders at once use the checkbox to select each one and click Done at the bottom of the page.

When the work order is marked “Done” it will automatically update the item status to in transit and a transit letter is printed. Scanning in the item at the Circulation Desk (or re-shelving unit) will place the item back on the shelf and the work order is completed.