



Work Order workflows

February 2020

Svetlana Smirnov



- Introduction
- Different Department Models
- Workflows DEMO
- Work Order Configuration

Slides for additional reading

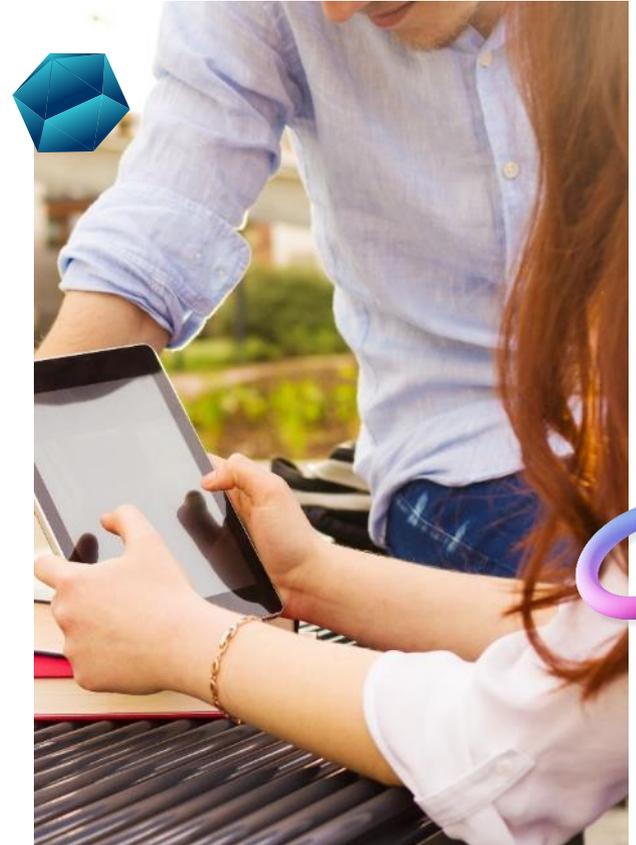
- *How to place item in work order process*
- *Monitor Work Orders*
- *Processing Work Orders*

Introduction

- Library needs a workflow for managing internal processes for physical items, like binding, repair, administration of any other type, etc., where item can easily be placed to a process, tracked and returned to a shelf
- For this purpose Alma uses department/s created based on institution or specific library needs, where staff can apply appropriate processing workflow using customized statuses

Introduction

- What is work Order?
 - Work Order is an internal library requests to route physical materials through that processing.
 - Item in work order request is displayed as ***not on shelf***
 - Staff can see in which process item is
 - Patrons can place requests on item in work order processing





Different Department Models

Introduction

- Do you need multiple work order departments?
- Do you need multiple work order statuses?
- Staffing—do people perform multiple tasks?

One Work Order Department

Operators can filter according to the status that they perform within the work order department

Multiple Work Order Departments

Operators may need to scan in and send items to each work order department

Staff may need to change their “Currently at” location to see items in other work order departments

Introduction

- Institution or library level department should be used?

Example of questions to ask -

- Does the process managed centrally for multiple libraries?
- Do you have one library under institution where same staff member manages all tasks?
- Is the administrative process relevant to other libraries in the institution?
- Who has permission to manage the process?

Different Department Models

Workflow models to review in this presentation where different level (institution/library) departments were setup -

- Default Technical Services Department
- Institution level department that serves all libraries
- Library level department

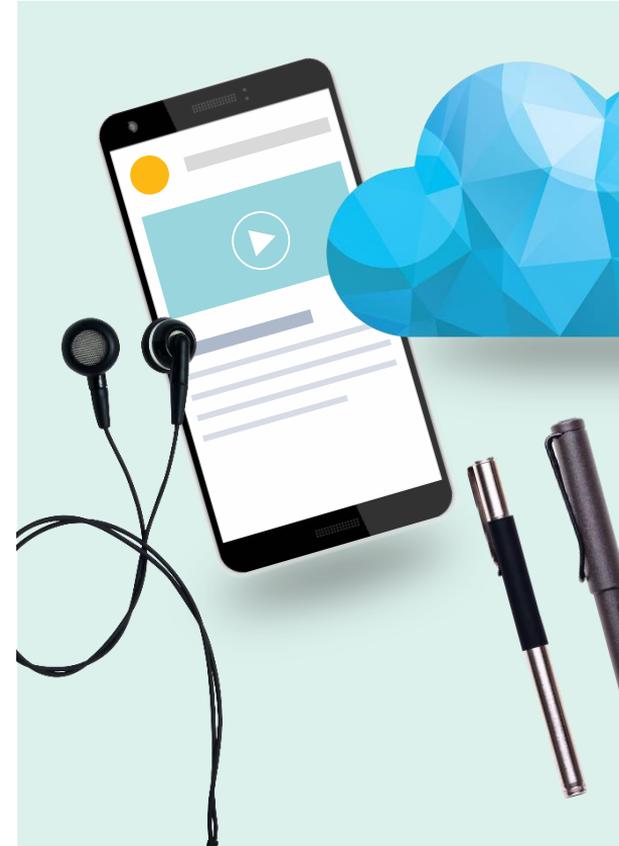
Default Technical Services Department

- Default Technical Services Department is an OTB library level department provided for managing receiving ordered items
- Each library has OTB acquisition Department which can be used as Technical Services Department for different processes.
- OTB department can be enhanced by desired statuses and used to manage additional library processes



Institution level Work Order Department

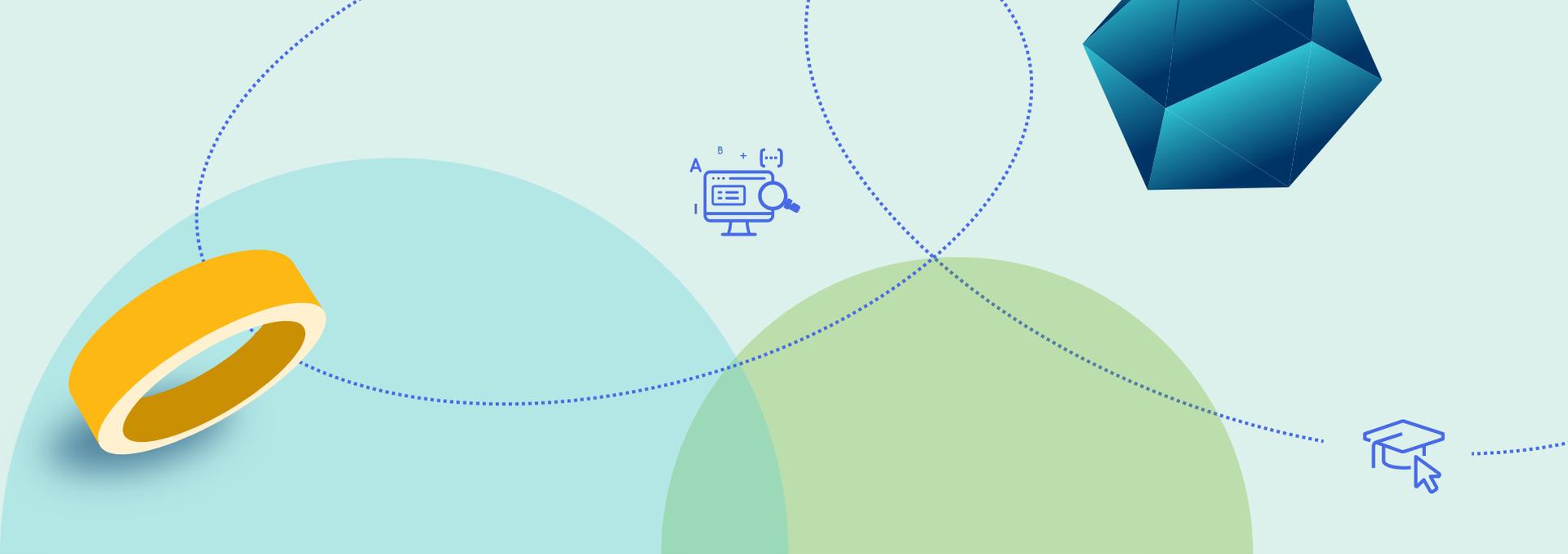
- You create Department on institution level that will serve all libraries in the institution
- Item will be transferred from library circulation desk to institution department for processing and back to library circulation desk when process finished
- Dedicated staff with a department scope role manages processes for the items



Library level Department

- In addition to OTB default Technical Services Department it's possible to define department dedicated to a specific process/es
- Any library level work order type can be linked to a circulation desk
- If work order is linked to a circulation desk, items will not be transited from circ desk to a department and back for processing

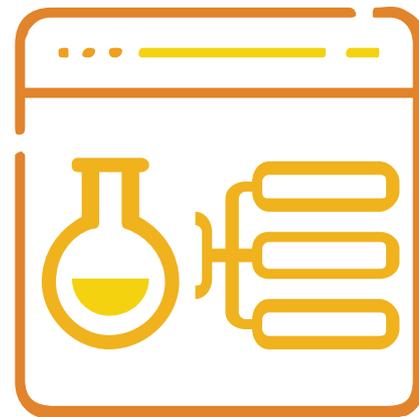




Things To Consider and Best Practices

Things to Consider

- Work Orders are useful in situations when an item needs to be taken out of circulation for a short time
- Use Alma integrated workflows for processes covered in another functional areas, like
 - Missing items
 - Digitizing an item
 - Lost items
 - Resource Sharing services



Things to Consider

1. What *types* of work do you want to accomplish with work orders?
 2. In what *department* does that work occur?
 3. Define *statuses* to represent each step or task that you want to include for each work order type
- For simplicity, you might consider using one work order department with various statuses to reflect the work needed within the department

Best Practices

- Create work order types at the institution level
- If there is one physical department at your institution where all staff are sitting in the same room or area or in close proximity to each other, our recommendation is to use a single department with additional statuses.
- If your institution has different physical departments, we recommend creating distinct work order departments. If each department performs distinct processes, we recommend creating distinct work order types, each with its own statuses.

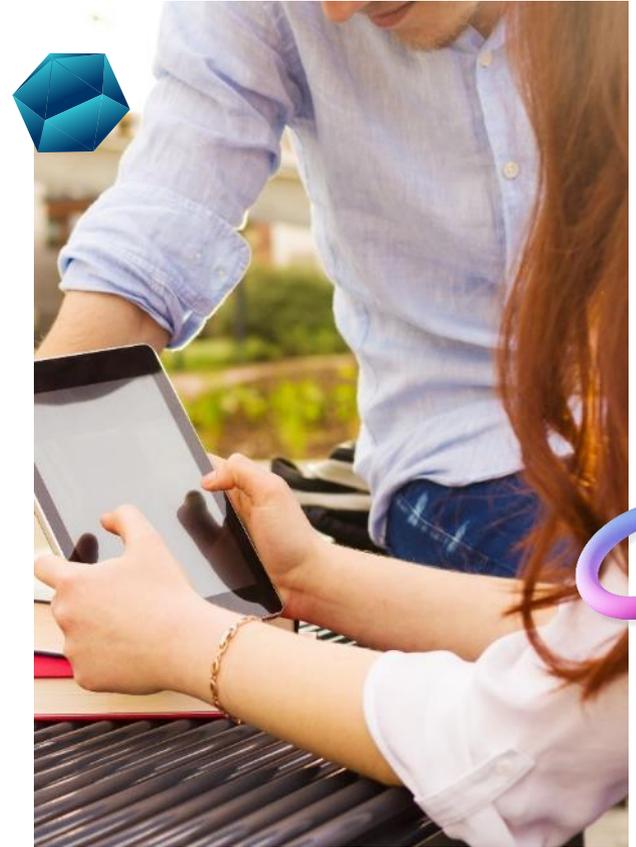




DEMO Workflows

Workflows

- Discuss workflows managed by different departments -
 - Default Technical Services department workflow
 - Institution level department Binding workflow
 - Library level department Repair workflow

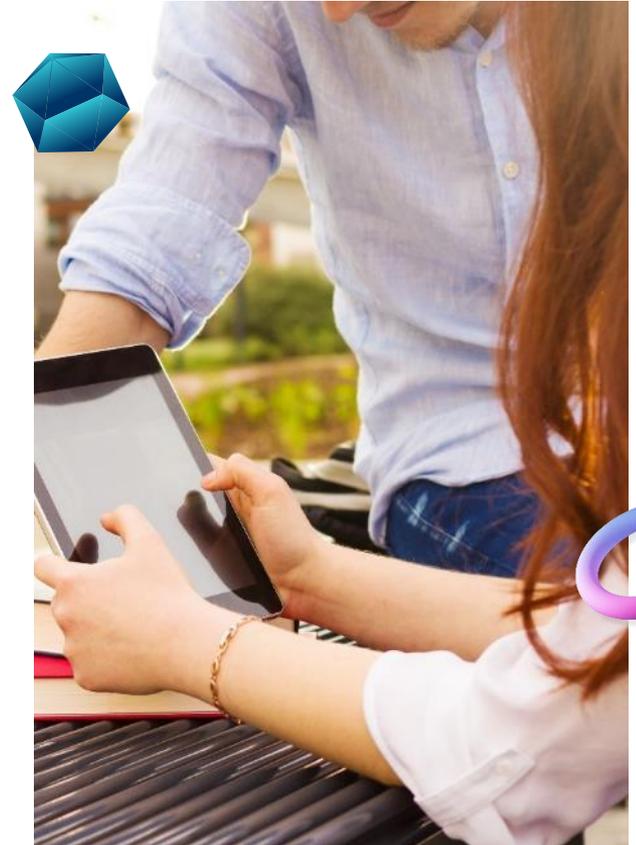




Work Order Configuration

Work Order Configuration

- [https://knowledge.exlibrisgroup.com/Alma/Training/Alma Administration Certification/General/General 01%3A Work Orders](https://knowledge.exlibrisgroup.com/Alma/Training/Alma%20Administration%20Certification/General/General%2001%3A%20Work%20Orders)
- See handout attached to the training as well



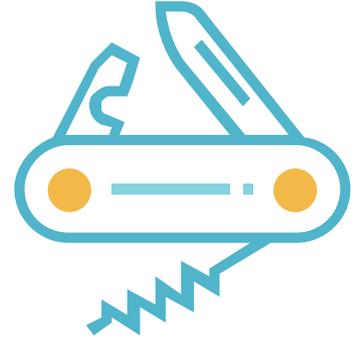


How to place item in work order process

User Roles

Who can *create* work order requests?

- Fulfillment Services Operators, Managers
- Digital Inventory Operators
- Physical Inventory Operators
- Purchasing Operators, Managers
- Repository Manager
- Requests Operator

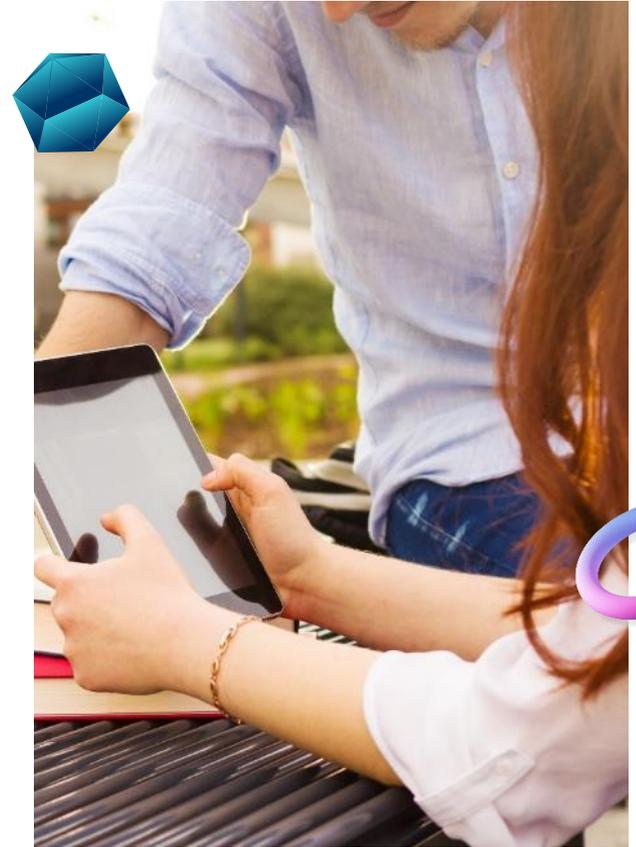


Work Order Operators *handle* work orders within the work order department

General System Administrators *configure* work orders types, departments, and statuses

Creating Work Orders

- Produced automatically, in certain situations – example - > Quick Cataloging
- Via search for Physical Items
- At the time an item is loaned to a patron
- When a patron returns an item to the library
- From a list of items
- Within an Item Record
- Create work order request in bulk by running “Create physical item work orders” job on a set of records



Automatic Work Order Creation

- Manage Patron Services Workbench

The screenshot displays the 'Patron Services' interface. At the top left is a back arrow and the title 'Patron Services'. On the top right are buttons for 'Edit User Info', 'Submit Request', 'Refresh Blocks/Notes', and 'Done'. The main content area is divided into two sections. The left section shows user details for 'Cody, Petrina': 'Active balance' is 0.00 USD, 'ID' is 26922, and 'User group' is Undergraduate Student. There are links for 'Send Activity Report' and 'Send Requests Report'. The right section is titled 'User Notes' and contains an 'Add Note' link. Below these sections are three tabs: 'Loans', 'Returns', and 'Requests'. At the bottom, there is a search bar with the text 'Scan item barcode *' and a search icon. The search bar contains the text 'Look-up or select'. To the right of the search bar are a menu icon, 'OK', and a red-bordered button labeled 'Create Item'.

Automatic Work Order Creation

- Receiving Workbench

The screenshot displays the 'Receive New Material' interface. A red box highlights a dropdown menu for 'Keep in Department' with the following options: Copy Cataloging, Original Cataloging, Physical Processing, and Temp Storage. Other interface elements include a 'Received Date' field set to 08/27/2018, 'One Time' and 'Continuous' buttons, and a table of material orders.

Item description	#	Status	Locations	# Ordered	Items Received	Date Sent	Next Step	Rusl	Note	Receiving note	Interested Users
1 <input type="checkbox"/> Rogue justice : the making of the security state / Karen J. Greenberg., New York :, Crown Publishers., 2016, 9780804138215 (hardback),	POL-7902	Sent	Law Library - Stacks (1)	1	0	01/17/20...	-				

Manual Work Order Creation

- Physical Item Search

The screenshot shows a search results page for the book "101 uses for a dachshund". The search criteria are "Physical items" and "Keywords: 101 uses for a dachshund". The results are sorted by "Publication Date - Desc" and "Secondary Sort by: Rank". The first result is highlighted, and a context menu is open over it, with "Work Order" selected.

Physical items ▾ Keywords ▾ 101 uses for a dachshund

Physical Items (1 - 1 of 1) | 101 uses for a dachshund Save Query

🏠 Institution | 👤 Community

Sort by: Publication Date - Desc ▾ Secondary Sort by: Rank ▾

1  **101 uses for a dachshund** .

Book By Willow Creek Press (Minocqua, Wis. : Willow Creek Press 2013.)
Barcode: 2015067525
Update Date: 07/08/2016
Library: Science Library
Expected Arrival Time: -
On Hold Expiration Date: -
Due Date: -
Needed By: -
Until: -
Permanent Location: Science Stacks

Call Number: SF429.D25 A16 2013
Call Number Type: Library of Congress classification
Alternative Call Number Type: Library of Congress classification
Status: Item in place
Due back: -
Material Type: Book

Edit Item Request ⋮

- Resource sharing request
- Work Order**
- Withdraw
- Holdings
- Display in Discovery
- Items

[Other details](#)

Manual Work Order Creation

- Physical Item Search

< Place Item in Process

101 uses for a dachshund.

Institution Clean Training

Place Item in Process

Process Type *

- Acquisitions
- Digitization
- Preservation
- Technical Services

< Place Item in Process

101 uses for a dachshund.

Institution Clean Training

Place Item in Process

Process Type * **Preservation**

Do not pick from shelf

Note **Pages 7 and 18 are torn. Please repair.**

Managing Department * **Institutional Preservation Dept**

Manual Work Order Creation

- At Checkout

The screenshot displays the 'Patron Services' interface for a user named Tom Bisbikis. The user's active balance is 0.00 USD, and they are an Undergraduate Student. The interface includes tabs for Loans, Returns, and Requests. A 'Scan item barcode' field is present with an 'OK' button and a 'Create Item' link. Below this, a table lists two loans. A context menu is open over the first loan, with 'Work Order' highlighted in a red box. Other menu options include 'Delete Loan', 'Change due date', 'View Notes', 'View Queue', 'View Policies', and 'View hidden'.

Patron Services

Edit User Info Submit Request Refresh Blocks/Notes Done

Bisbikis, Tom

Active balance 0.00 USD Send Activity Report

ID 100006 Send Requests Report

User group Undergraduate Student

User Notes

Add Note

Loans Returns Requests

Scan item barcode * [input] [menu] OK Create Item

1 - 2 of 2

Loan Display: Loans of this session

Title	Due Date	Barcode	Fine	Loan Date	Loan Status	Item Policy
1 <input type="checkbox"/> Animals as neighbors : the past and present of commensal species / Terry O'Connor.	11/27/2018 19:00:00 CST	2530113615	-	08/27/2018	Normal	- Science Library
2 <input type="checkbox"/> H is for Hawk / Helen Macdonald.	11/27/2018 23:59:00 CST	2013512772	-	08/27/2018	Normal	- Main Library

Work Order

Delete Loan

Change due date

View Notes

View Queue

View Policies

View hidden

Manual Work Order Creation

- When Returning an item

The screenshot displays the 'Patron Services' interface. At the top, there are navigation buttons: 'Edit User Info', 'Submit Request', 'Refresh Blocks/Notes', and 'Done'. Below this is a user profile for 'Koszarek, John' with an 'Active balance' of 25.00 USD and a 'Pay' button. There are also links for 'Send Activity Report' and 'Send Requests Report'. To the right is a 'User Notes' section with an 'Add Note' button. Below the profile are tabs for 'Loans', 'Returns', and 'Requests'. A search bar for 'Scan item barcode' is present. The main content area shows '1 - 1 of 1' returns. A dropdown menu is open over the first return row, listing options: 'Work Order', 'Loan History', 'View Notes', 'View Queue', and 'View hidden'. The 'Work Order' option is highlighted with a red box.

Title	Return Date	Due Date	Barcode	Fine	Loan Date	Next Step	Owned
Trace : a journey through 1 memory, history, and the american land.	08/27/2018 13:35:00 CDT	11/27/2018 23:59:00 CST	2531270507	-	08/27/2018	Reshelve to Stacks	Main Library

Manual Work Order Creation

- From a list of items

The screenshot shows a library catalog interface. At the top, there is a header 'List of Items' with a back arrow on the left and a 'Back' button on the right. Below the header, there is a book icon and the title 'The last of the barons / Lytton, Edward Bulwer Lytton, Baron, 1803-1873. Chapman and Hall London : 1850.' with a dropdown arrow. Below the title is a 'View all holdings' link. The interface includes a search bar with 'Call number' as the selected filter, a search icon, and options for 'Sort routine', 'Change Holdings', and 'Relink to another'. Below the search bar are filters for 'Status : All', 'Library : All', and 'Location : All'. The main content is a table with columns: Barcode, Library, Location, Call Number, Description, Temporary Location, Status, and Process type. The first row is highlighted in blue. A context menu is open over the first row, listing options: View, Edit, Duplicate, Change Location, Withdraw, Toggle Missing Status, Work Order (highlighted with a red box), and View hidden. The second row is also visible in the table.

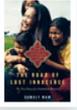
	Barcode	Library	Location	Call Number	Description	Temporary Location	Status	Process type			
1	80208	Main Library	Stacks	F L998La	-	No	Item in place	-	-	-	...
2	80190	Main Library	Stacks	F L998La	-	No	Item in place	-	-	-	...

Manual Work Order Creation

- From an item record

Physical Item Editor

Relink to another bibliographic record Cancel Save

 The road of lost innocence / Mam, Somaly. Spiegel & Grau New York : 2008. [9780385526210] ⓘ

Holdings Law Library: Stacks; HQ242.3.A5 M3613 2008
Holdings ID 225172780000541 View all holdings
Barcode 15344446 Item ID 235172760000541 View all items
Process type - Status Item in place Browse shelf list...

General ENUM/CHRON Notes History

General Information

Barcode	15344446	Generate	Copy ID	0
Material type	Book		Item policy	
Provenance			Is magnetic	No
PO Line	Select from a list		Issue date	
Receiving date			Expected receiving date	
Enumeration A			Enumeration B	
Chronology I			Chronology J	
Description		Generate		
Pages			Pieces	1
Replacement cost			Receiving operator	
Physical condition				
Process type	Preservation		At *	Institutional Preservation Dept

Create Work Orders in Batch

Run a Job - Select Job to Run

1 - 9 of 9 Description ▾ physical 🔍

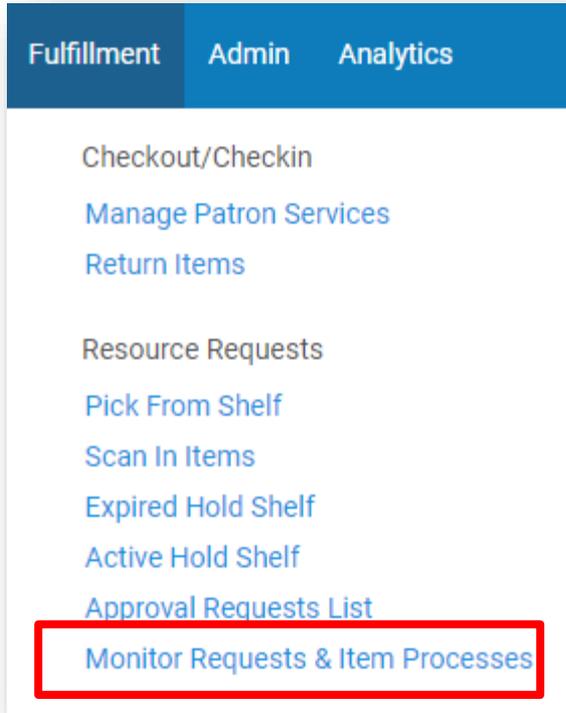
▼ Type : All ▾ Source type : All ▾

	▼ Name	↕ Description	Content Type	↕ Type
1	<input type="radio"/> Withdraw items	Withdraw physical items task.	Physical item	Withdraw
2	<input type="radio"/> Export Physical Items Labels	Export physical items labels for printing	Physical item	Export
3	<input type="radio"/> Export Physical Items	Export Physical Items	Physical item	Export
4	<input type="radio"/> Create physical item work orders	This task chain creates work order requests on the physical items.	Physical item	Request
5	<input type="radio"/> Create physical item move requests	Update item information and initiate moving a set of physical items to a new location.	Physical item	Information Update
6	<input type="radio"/> Change physical items	Update item information for a set of physical items.	Physical item	Information Update
7	<input type="radio"/> Change Holding Information	Update holding information for a set of physical items	Physical item	Information Update
8	<input type="radio"/> Cancel physical titles requests	Cancel open requests for physical items.	Physical title	Request
9	<input type="radio"/> Cancel physical items requests	Cancel open requests for physical items.	Physical item	Request



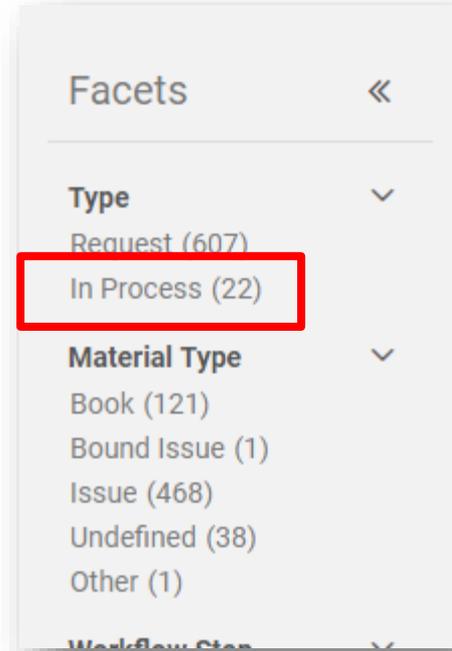
Monitor Work Orders

Monitor Work Orders



A screenshot of a navigation menu with three tabs: Fulfillment, Admin, and Analytics. The Fulfillment tab is active. The menu items are: Checkout/Checkin, Manage Patron Services, Return Items, Resource Requests, Pick From Shelf, Scan In Items, Expired Hold Shelf, Active Hold Shelf, Approval Requests List, and Monitor Requests & Item Processes. The last item is highlighted with a red box.

- Fulfillment
- Admin
- Analytics
- Checkout/Checkin
- Manage Patron Services
- Return Items
- Resource Requests
- Pick From Shelf
- Scan In Items
- Expired Hold Shelf
- Active Hold Shelf
- Approval Requests List
- Monitor Requests & Item Processes



A screenshot of a 'Facets' sidebar. The title is 'Facets' with a double left arrow icon. Below the title is a horizontal line. The first facet is 'Type' with a downward arrow icon. It has two sub-items: 'Request (607)' and 'In Process (22)'. The 'In Process (22)' item is highlighted with a red box. The second facet is 'Material Type' with a downward arrow icon. It has five sub-items: 'Book (121)', 'Bound Issue (1)', 'Issue (468)', 'Undefined (38)', and 'Other (1)'. The third facet is 'Workflow Step' with a downward arrow icon.

Facets <<

Type ▾

- Request (607)
- In Process (22)

Material Type ▾

- Book (121)
- Bound Issue (1)
- Issue (468)
- Undefined (38)
- Other (1)

Workflow Step ▾

Monitor Work Orders

Facets <<

Material Type ▾
Book (19)
Undefined (3)

Workflow Step ▾
Pickup From Shelf (3)
Transit Item (2)
Undefined (2)
In Process (15)

Request/Process Type ▾
Acquisition technical... (8)
Digitization (2)
Preservation (6)
Technical Services (6)

Request Date ▾
Older (22)

Date Needed By ▾

< Resource Request Monitoring (1 - 20 of 22) Cancel

Activity Status: **Active** ▾ | Type: **In Process** ✕ [Clear all](#)

1  **Green apple harvest / by Sheila Kaye-Smith.**

Request Type: Acquisition technical services	Place in Queue: 0	Workflow Step: Transit Item
ID: 117939720000521	Call Number: F K23g	Process Status: In Process
Creator: Braun, Connie	Request Date: 09/16/2015	Managed By Library: Main Library
Barcode: 14314293874		Managed By Desk: Main Library Circulation
Pickup Location: Technical Services		Process Date: 09/16/2015
		Expiration Date: 09/17/2015

Cancel Print Slip ⋮

- Edit
- Update Expiry
- Mark as Missing
- View Title in Search
- View Audit Trail

2  **A brief tax guide for the independent music teacher.**

Request Type: Acquisition technical services	Place in Queue: 0	Workflow Step: Transit Item
ID: 117941300000521	Call Number: HJ4652 .M87 1989	Process Status: In Process
Creator: Braun, Connie	Request Date: 09/16/2015	Managed By Library: Graduate Library

Cancel Print Slip ⋮

Monitor Work Orders



Making Americans healthier : social and economic policy as health policy / [edited by] Robert F. Schoeni ... [et al.]. Edit Item Request ...

Book By Schoeni, Robert F. (New York : Russell Sage Foundation c2007.) **Call Number:** RA395.A3 M3525 2007 **Requests: 1**

Barcode: 14956757 **Status:** Item in place

Update Date: 07/08/2016



Making Americans healthier : social and economic policy as health policy / [edited by] Robert F. Schoeni ... [et al.]. Cancel Print Slip ...

Request Type: Preservation	Place in Queue: 0	Workflow Step: Pickup From Shelf
ID: 1333093940000521	Call Number: RA395.A3 M3525 2007	Process Status: New
Creator: Implementer, Ex Libris 	Request Date: 08/30/2018	Managed By Library: Science Library
Barcode: 14956757	Note: Please check the binding.	Managed By Desk: Circulation
Pickup Location: Institutional Preservation Dept	Material Type: Book	Process Date: 08/30/2018
		Expiration Date: 09/06/2018



Processing Work Orders

Processing Work Orders



Scan in Item at Work
Order Department



Set/Edit status for
next steps



When done, scan and
send item to
Circulation Desk



Circulation Desk
Scans in and
reshelves

Institutional Preservation Dept

Always show current location

Processing Work Orders

The screenshot displays the 'Scan In Items' interface. At the top, there are buttons for 'Clear List', 'Manage In Process Items', and 'Exit'. Below this, there are two tabs: 'Scan in Items' and 'Change Item Information'. The 'Scan in Items' tab is active, showing several form fields: 'Automatically print slip' with radio buttons for 'Yes' and 'No' (selected); 'Set Status To' with a dropdown menu set to 'Analysis'; 'Done' with radio buttons for 'Yes' and 'No' (selected); 'Scan item barcode *' with a search input field containing 'look-up or select' and an 'OK' button; and 'Scan request ID' with an empty input field and an 'OK' button. A 'Create Item' button is also visible. At the bottom, there is a table with the following data:

Title	Destination	Barcode	Request/Proce Type	Requester	Requester ID	Place in Queue	Checked In
1 Making Americans healthier : social and economic policy as health policy / [edited by] Robert F. Schoeni ... [et al.].	Manage Locally	14956757	Preservation	-	-	1	...

Processing Work Orders

< In Process Items Scan In Items

1 - 6 of 6 Generate Barcode Change Status

▼ Process Status : All ▼ Request Filter : All ▼ Library : All ▼

	▲ Title	Barcode	↕ Status	↕ Date received for department	↕ End of Activity	Modified By	Modificatic Date	Requests	Notes	Library	
1	<input type="checkbox"/> Deep Alberta : fossil facts and dinosaur digs / John Acorn.	2530174842	Binding	08/30/2018	09/01/2018	ex_limpl	08/30/2...	No requests	✓	Science Library	<input type="button" value="..."/>
2	<input type="checkbox"/> Making Americans healthier : social and economic policy as health policy / [edited by] Robert F. Schoeni ... [et al.].	14956757	Analysis	08/30/2018	09/01/2018	Ex Libris	08/30/2...	No requests	✓	Science Library	<input type="button" value="..."/>
3	<input type="checkbox"/> My turtle died today / by Edith G. Stull ; illus. by Mamoru Funai.	97459	Repair In-House	08/30/2018	09/01/2018	ex_limpl	08/30/2...	No requests	✓	Main Library	<input type="button" value="..."/>
4	<input type="checkbox"/> One summer in between.	91954	Binding	08/30/2018	09/01/2018	ex_limpl	08/30/2...	No requests	✓	Main Library	<input type="button" value="..."/>
5	<input type="checkbox"/> Trace : a journey through memory, history, and the american land.	2531270507	Binding	08/27/2018	08/29/2018	connie.bra...	08/30/2...	No requests		Main Library	<input type="button" value="..."/>
6	<input type="checkbox"/> Winter world : the ingenuity of animal survival / Bernd Heinrich.	2051375345	Repair In-House	08/30/2018	09/01/2018	ex_limpl	08/30/2...	No requests	✓	Science Library	<input type="button" value="..."/>

Processing Work Orders



The road of lost innocence / by Somaly Mam with Ruth Marshall.

Book By Mam, Somaly. (New York : Spiegel & Grau 2008.)

Barcode: 15344446

Update Date: 07/08/2016

Library: Law Library

Process type: Transit

To Library: Law Library

Expected Arrival Time: 08/31/2018

On Hold Expiration Date: -

Due Date: -

Needed By: -

Until: -

Permanent Location: Stacks

[Other details](#)

Call Number: HQ242.3.A5 M3613
2008

Status: Item not in place

Due back: -

Material Type: Book

Requests: 1

[Edit Item](#) [Request](#) [...](#)

Processing Work Orders

Law Library - Law Library Circulation

Always show current location

Scan In Items

Scan in Items

Change Item Information

Automatically print slip Yes No

Register in-house use

Scan item barcode *

15344446



OK

Scan request ID

OK

Processing Work Orders

< Scan In Items

Clear List

Exit

Scan in Items

Change Item Information



The road of lost innocence / by Somaly Mam with Ruth Marshall.

Edit Item

Request



Book By Mam, Somaly. (New York : Spiegel & Grau 2008.)

Barcode: 15344446

Update Date: 07/08/2016

Library: Law Library

Expected Arrival Time: -

On Hold Expiration Date: -

Due Date: -

Needed By: -

Until: -

Permanent Location: Stacks

Call Number:

HQ242.3.A5 M3613
2008

Status: Item in place

Due back: -

Material Type: Book

[Other details](#)



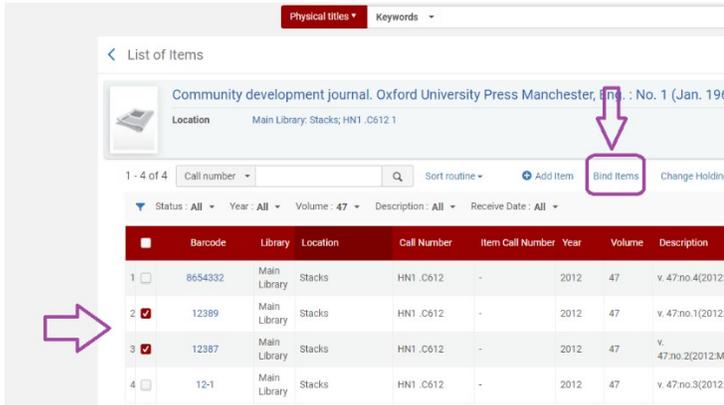
Thank you!

Svetlana.Smirnov@exlibrisgroup.com

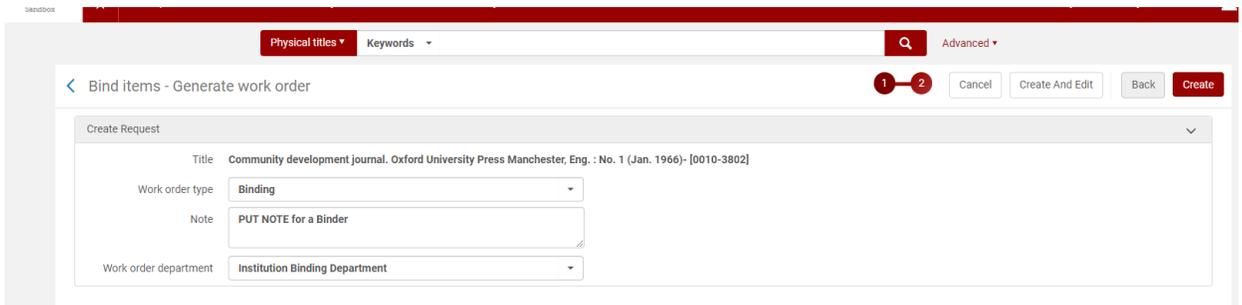
Institution level Binding work order department

Binding workflow steps (use Sandbox 4 NBY)

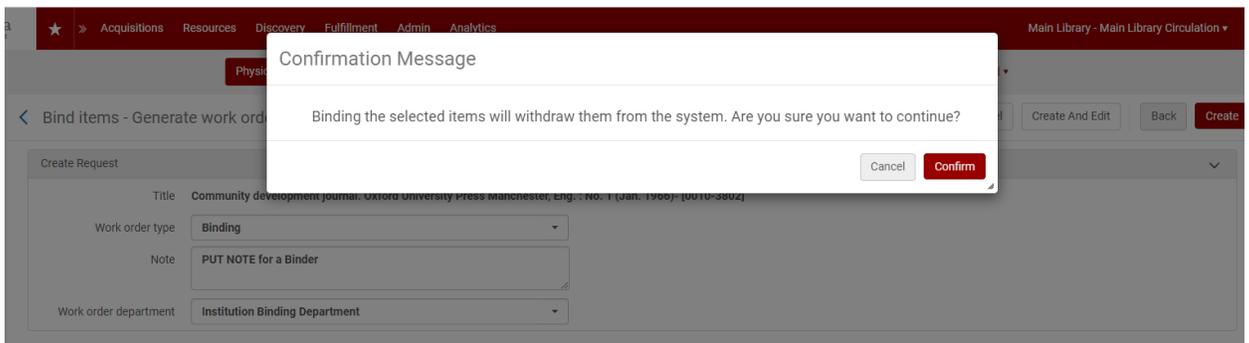
1. Search physical titles for a journal "Community development journal" - 0010-3802
2. Open items list
3. Select items to bound together



4. Click 'Bind Items'
5. Check that list of selected items is correct to bound together
6. Click Next
7. Select Work order type and Work Order department that will store and manage binding. Add note as desired



8. Click Create or Create and Edit, if desired



9. System will delete items and create a new bound item.

Physical Item Editor Relink to another bibliographic record

Holdings Main Library: Stacks; HN1 .C612.1
 Holdings ID 228345030000521
 Barcode 12393 Item ID 238969960005867 View all holdings
 Process type Binding Status Item not in place View all items
 Browse shelf listing

General | ENUM/CHRON | Notes | History

General Information

Barcode Copy ID

Material type **Bound Issue** Item policy

Provenance Is magnetic

Holdings PO Line **POL-5624** Issue date

Receiving date **01/28/2020** Expected receiving date

Enumeration A **47** Enumeration B

Chronology I **2012** Chronology J

Description Pieces

Pages Receiving operator **Staff, Ex Libris**

Replacement cost At * **Institution Binding Department**

Physical condition Process type **Binding**

10. Edit bound issue information. Edit Enumeration/Chronology, item policy, Barcode. Save.

11. Item will have process type and assigned to a selected department (this configurable and will depend on customization and settings)

In our example it is -

Physical condition

Process type **Binding** At * **Institution Binding Department**

12. Item shows Process type in items list

LIST OF ITEMS

Community development journal. Oxford University Press Manchester, Eng. : No. 1 (Jan. 1966)- [0010-3802]

Location Main Library: Stacks; HN1 .C612.1 View all holdings

1 - 3 of 3 Sort routine

Status: All Year: All Volume: 47 Description: All Receive Date: All

	Barcode	Library	Location	Call Number	Item Call Number	Year	Volume	Description	Temporary Location	Status	Process type	Access Number	Receiving date	
1	8654332	Main Library	Stacks	HN1 .C612	-	2012	47	v. 47:no.4(2012:Oct)	No	Item in place	-	-	07/19/2013	...
2	12393	Main Library	Stacks	HN1 .C612	-	2012	47	v.47:no.1-2(2012)	No	Item not in place	Binding	-	01/28/2020	...
3	12-1	Main Library	Stacks	HN1 .C612	-	2012	47	v. 47:no.3(2012:Aug)	No	Item in place	-	-	-	...

13. Item is managed by selected Department. Staff user that have a role enabling the department can connect to a specific department

Main Library - Main Library Circulation

Look-up or select

None of these

Institution Binding Department

Law Library - Law Library Circulation

Main Library - Main Library Circulation

Main Library - Main Library Technical Services

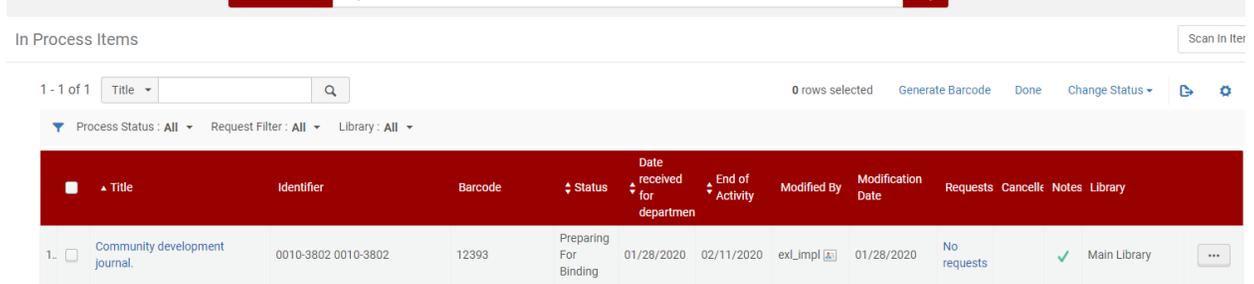
Music Library - Music Library Circulation

Resource Sharing Library - Resource Sharing Desk

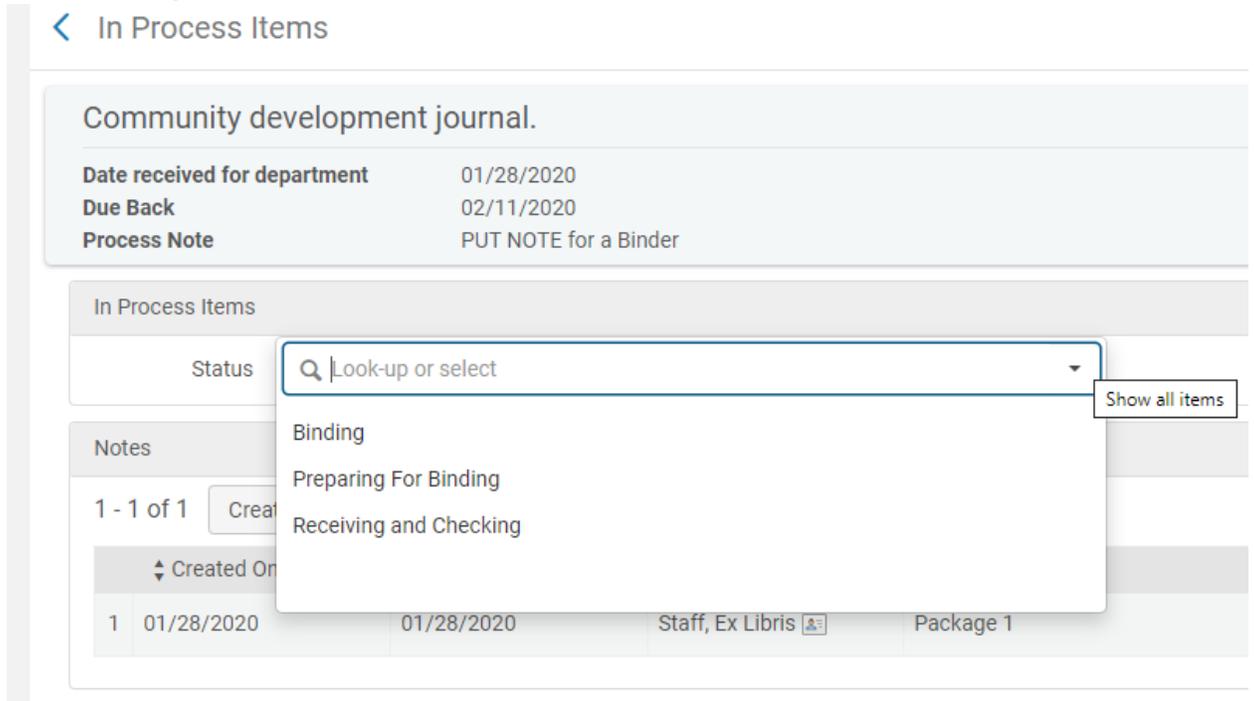
14. Go to Fulfillment Menu – Manage in Process Items



15. Under manage in Process items you can edit specific process – change status, check expiration date (set based on work order type), edit item, and finish the process.



16. Edit – to change status



17. To finish the process, click – Done.

In Process Items

1 - 1 of 1 Title 0 rows selected Generate Barcode Done Change Status [Share] [Settings]

Process Status: All Request Filter: All Library: All

Title	Identifier	Barcode	Status	Date received for department	End of Activity	Modified By	Modification Date	Requests	Cancel	Notes	Library
1. Community development journal.	0010-3802 0010-3802	12393	Receiving and Checking	01/28/2020	02/11/2020	ex_Lmpl	01/28/2020	No requests			Main Library

Context menu for the item:

- Edit Inventory Item
- Edit
- Done
- Update Expiry
- Print Slip
- View hidden

18. When work order is created on Institution level to serve all libraries and campuses of the institution item will be sent to item home library and status will be In Transit

In Transit Item

Title: **Community development journal.**

Requester: -

From: **Institution Binding Department**

To: **Main Library**

Transit Date: **01/28/2020 15:55:29 CST**

Expected Arrival Time: **01/29/2020 23:59:59 CST**

19. To set item in place it must be scanned under item's circulation desk. You will get re-shelve message

Scan In Items

Scan In Items Change Item Information

Automatically print slip Yes No

Register in-house use

Work Order Type [Dropdown]

Scan item barcode * [OK]

Scan request ID [OK]

20. Go to holdings record and update summary holdings if needed.

Configuration

Go to Work Order types

Configuring

Newberry Library (NBY) - Chicago, IL ▾

- Acquisitions
- Resources
- Discovery
- Fulfillment
- User Management
- General**

Filter List

🔍 Look-up or select

- Libraries**
 - Add a Library or Edit Library Infor
 - Relationships
 - Define Campuses
- Locations**
 - Remote Storage
- Work Orders and Departments**
 - Work Order Types
 - Work Order Departments
- External Systems**
 - Integration Profile

Add Work Order Type ▾

Code	Name	Description	Owner	Departments	
1. Binding	Binding	-	Newberry Library (NBY) - Chicago, IL	Institution Binding Department	⋮

Click on Actions (ellipses)

Manage Statuses

Binding

Work Order Type Code: Binding

Work Order Type Description: Manage Statuses

Add Status ▾

Code	Name	Description	Owner	
1 BackFromBinding	Receiving and Checking	-	Newberry Library (NBY) - Chicago, IL	⋮
2 Binding	Binding	-	Newberry Library (NBY) - Chicago, IL	⋮
3 PreparingForBinding	Preparing For Binding	-	Newberry Library (NBY) - Chicago, IL	⋮

Manage Department

Department Details Cancel

Institution Binding Department

Department Code: InstitutionBindingDepartment

Department Description: -

General Details | Served Libraries | Contact Information | Operators

Code: InstitutionBindingDepartment | Name: Institution Binding Department

Description:

Work Time(days): | Map:

Default Printer:

Additional Printers:

Operators

< Operators

Institution Binding Department

Department Code InstitutionBindingDepartment
Department Description -

General Details

Served Libraries

Contact Information

Operators

Name	
1	Administrator, Alma
2	Staff, Ex Libris

CARLI – using OTB Technical Services Department for work orders (UIC sandbox)

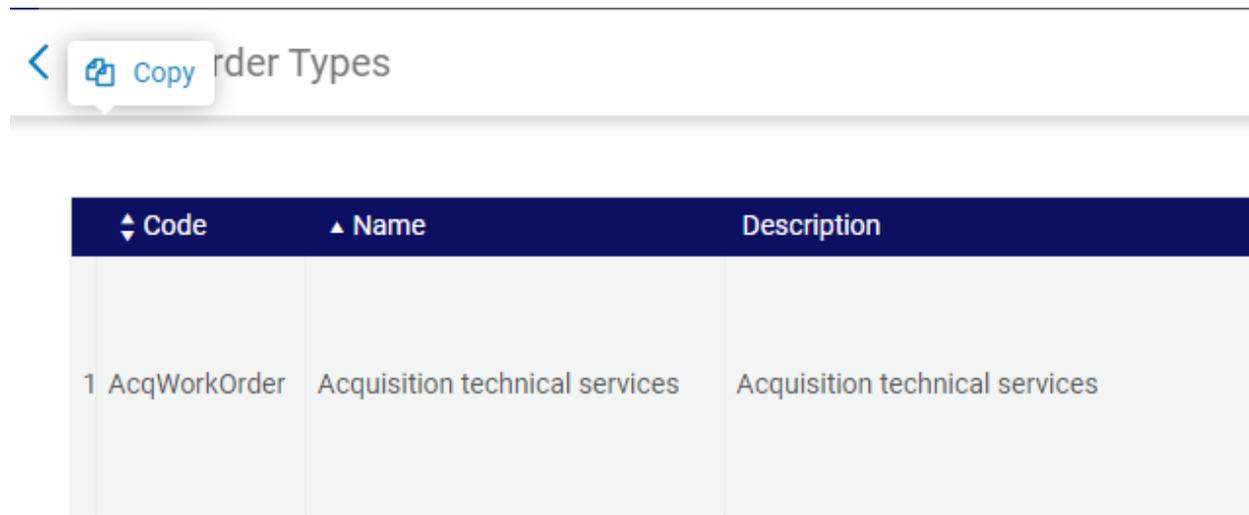
Each library has OTB acquisition Department which can be used as Technical Services Department for different processes.

For managing different processes additional statuses can be added to Technical Services Department.

Configuration Steps

Go to Alma Configuration – General – Configure selected library which will manage work orders

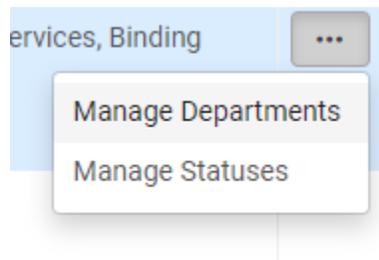
Edit AcqWorkOrder –



The screenshot shows the 'Order Types' configuration page in Alma. At the top left, there is a back arrow and a 'Copy' button. Below this is a table with three columns: 'Code', 'Name', and 'Description'. The table contains one row with the following data:

Code	Name	Description
1 AcqWorkOrder	Acquisition technical services	Acquisition technical services

Select 'Manage Statuses'



[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/050Administration/050Configuring_General_Alma_Functions/040Work_Orders_and_Departments#Configuring_Work_Order_Type_Statuses](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/050Configuring_General_Alma_Functions/040Work_Orders_and_Departments#Configuring_Work_Order_Type_Statuses)

Here is a workflow how to add item/s from a set to processing department by running a job

- Create a set
- Run a job Create physical item work orders
- Mark to pick up from shelf or not
- If pick up required – scan in should be done in circ desk and processing department
- If pick up is not selected, item is placed in the department task list. Update status of the process under processing department.

Work Order on Library Level that is linked to Circulation Desk

Example on Sandbox 5 – UIC

Adding Work Order Department to Circulation desk under Work order tab select Add – Select work order and number of days to manage items

< Circulation Desk - Work Order Types

You are configuring: Memorial Library

Circulation Desk

Code: DEFAULT_CIRC_DESK
Description: -

General Details | Physical Locations | **Work Order Types** | Operators | Automatic Printing

Work order type	Work order time (days)
1 Repair	21

You can put item to work order by scanning in item barcode and selecting work order department and status

Physical Items | keywords

Scan In Items | Change Item Information

Automatically print slip: Yes No

Work Order Type: Repair Department

Set Status To: In House Repair

Done: Yes No

Scan item barcode * 2013560076 [X] [Menu] [OK]

Scan request ID [] [OK]

To see items in Process – under circulation desk (currently at) – Fulfillment – Manage Items in process

The screenshot shows the Alma interface with the navigation menu on the left. The 'Manage In Process Items' option is highlighted with a red box. The top right corner shows 'Memorial Library - Circulation Desk'. The main content area shows a table with one row of data for 'Prehistoric art / T.G.E. Powell.' and a 'Done' button in the context menu.

Click Done to finish process

The screenshot shows the 'In Process Items' page. The table has one row for 'Prehistoric art / T.G.E. Powell.' with status 'In House Repair'. A context menu is open over the row, and the 'Done' button is highlighted with a red box.

Same can be done from scan in item barcode and selecting done

Item will be placed on shelf without Transit step

The screenshot shows the item details for 'Prehistoric art / T.G.E. Powell.'. The 'Status' field is highlighted with a red box and contains the text 'Item in place'. Other fields include 'Barcode: 2013560076', 'Call Number: N5310 .P63 1966a', and 'Item ID: 234240340000503'.

Configuration

Select to configure library in Alma Configuration

Configuring Filter List

Memorial Library 🔍 Look-up or select

Discovery

Fulfillment

General

Libraries

Relationships

Locations

Physical Locations

Work Orders and Departments

Work Order Types

Work Order Departments

Select Work Order Types

3. Repair	Repair Department	-	Springfield and Urbana	Memorial Library	Circulation Desk, Memorial Library Repair Departme...	...
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Work order Statuses

Work Order Type Statuses Back

You are configuring: Memorial Library

Repair Department ▼

Work Order Type Code: Repair
 Work Order Type: Manage Statuses
 Description:

Code	Name	Description	Owner	
1 InHouse	In House Repair	-	Memorial Library	...
2 OutSideRepair	Outside Repair	-	Memorial Library	...

+ Add Status 📄 ⚙️

Click on Manage Departments to see/add Department

Go to Circulation desk to link work order to circulation desk