Alma Administration – Fulfillment
Work Orders

Hello, work orders allow you to track where physical items are as they move through different kinds of library processes. They can be tracked, along with requests on the Resource Request Monitoring page. You can facet by Request/Process type to view specific types of work orders in the list. Work orders are only used for physical items.

A work order places a request on an item. When the item’s barcode is scanned the work order sends the item to a department and updates the status to "Item not in place" but still allows patrons to place future requests on it.

A work order is first assigned a type, which indicates the type of library process, such as preservation or cataloging. Each type then has a list of statuses that track the progress of the work order. For example, a preservation work order type might have gluing, sewing, etc., whereas digitization might have statuses such as digitizing, document delivery, etc. Lastly, a department or circulation desk is selected, this is the location in your library where the work order is being handled for the selected type.

Each of these types, statuses, and department can be configured according to your library’s needs.

In this session you will learn how to configure work order types, statuses, and departments.

Work orders are configured in the Configuration menu and can be created at both the library and institution level. But can only be attached to a circulation desk at the library level. In this tutorial you first need to create a new preservation work order at the institution level, as well as attach a minor repair work order type to a circulation desk that was previously configured by a colleague. So you’ll leave the Configuring menu set to the institution level for now.

To configure the new work order you’ll start by defining the new work order type. You’ll go to General > Work Orders and Departments > Work Order Types. The Work Order Types page provides a list of the all the different types available within your library.

Please note that AcqWorkOrder is an out-of-the-box default Work Order Type and is tied to Acquisitions functionality. You are only able Manage Statuses and Edit it, you cannot Manage Departments or Delete it.

When you click on the row action tool, you can:

* Manage Departments, to make any changes to the associated departments
* Manage Statuses, to make any changes to the current statuses within that type
* Edit, which will allow you change the Name and Description, as well as whether this type will recall any loans
* Or Remove, to delete the work order type

To create a new work order type, click Add Work Order Type. You need to create a new type for Preservation, in the drop-down you are required to provide a Code… Name… and optionally a description. And determine whether you would like this new type to recall loans, since this is for preservation you’ll uncheck Recalls Loans. Once you’re done, click Add Work Order Type.

Next you need to define the statuses that will be added to the work order type. Click on the row action tool of the work order you just created and select Manage Statuses. Click Add Status. The Code and Name are required, and you can optionally add a Description. When you’re done click Add Status. Repeat this process for the remaining statuses.

Statuses are automatically saved after you add them. Once you’ve added all the necessary statuses, click on the back arrow, or use the Back button.

Next you need to add a department, signifying where the work will be completed. There are two ways to create a new department, by either going back to General > Work Orders and Departments > Work Order Departments. Or you can click on the row action tool for your type and select Manage Departments.

Please note, if you access the Department List page from the General menu it will display all the current work order departments for your library.

To add a department, click Add Department. This will open the Department Details wizard. The only required fields on the first page are the Code and Name. If the Work Time(days) field is left blank or set to 0, Alma will use a default of 7 days. Select a printer if you want routing slips to be printed. Click Next when you’ve finished entering all your information.

On the next page verify that your institution name is listed, and you can also attach a specific library within your institution, by clicking Attach Library, and selecting it from the drop-down. Click Attach if you selected one. Then click Next.

The third page of the wizard allows you to add department contact information including: addresses, phone numbers, and email address. This information is optional. Click the Add button in each section to add any information as needed. When you’re done click Next.

The last page of the wizard is where you can add library staff members who can process materials in this work order department. Click Add Operator, and either type in a name, or click the list icon to search for users. When you're done, click Save. And then Back. And your new work order is now complete.

Now you need to attach a minor repair work order type to a circulation desk for a colleague who has already configured it. Still in the Configuration menu, you'll first switch to the library that the circulation desk is at in the Configuring menu. Then go to Fulfillment > Library Management > Circulation Desks. Open the row action tool for the circulation desk you want to add the Work Order Type to, and select Edit.

Click on the Work Order Types tab. Here you can see any Work order types attached to this circulation desk. To add the new work order you'll click Add Work Order, and select the Work order type in the list. Enter in the Work order time in days, and then click Add work order. When you’re done, click Save. The Work Order type has now been attached to the circulation desk.

You now know how to configure work order types, statuses, and departments. Thanks for watching!