



# Work Orders in Alma

Configuration and Workflow

EX LIBRIS  
*Knowledge Days*

ExLibris®  
Part of Clarivate



## Agenda

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

- Introduction
- Configuration
- Work Order Workflow:
  - Creating Work Orders
  - Processing Work Orders
  - Completing Work Orders
- Tips and tricks
- Documentation





# Introduction

# What is a Work Order?

- Work Order is an internal library Request
- The request is placed on a Physical Item
- The item is “In Process” during the lifecycle of the Work Order
  - It means that Primo shows the item as "not available”

BOOK  
The cactus eaters : how I lost my mind and nearly found myself on the Pacific Crest Trail yaj ; White, Dan, 1967-  
White, Dan, 1967-  
©2008

Not Available >  
Book reviews (1) >

TOP  
SEND TO  
GET IT  
DETAILS

LOCATION ITEMS  
Main Library  
Not available, Main Stacks ; GV199.42.P3 W45 2008  
(1 copy, 0 available, 1 request)

In process of Digitization until 04/16/2023  
Loanable

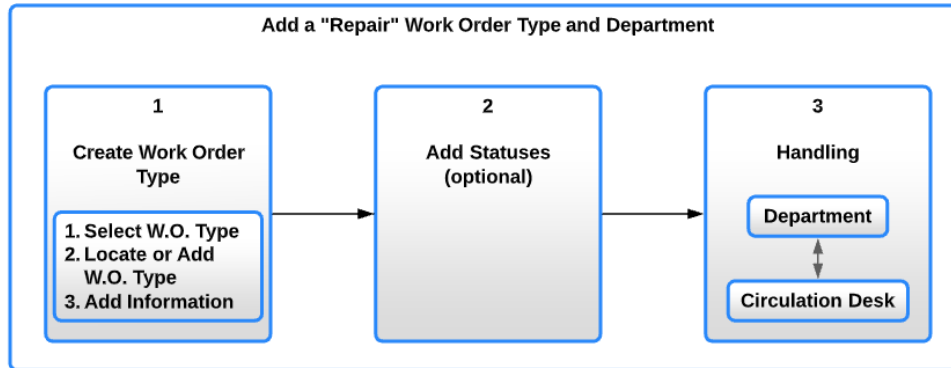
EMAIL EASYBIB PRINT PERMALINK



# Configuration

# Configuration

- Role required: General System Administrator
- Configure three elements:
  - Work Order Type
  - Work Order Status
  - The handling Department



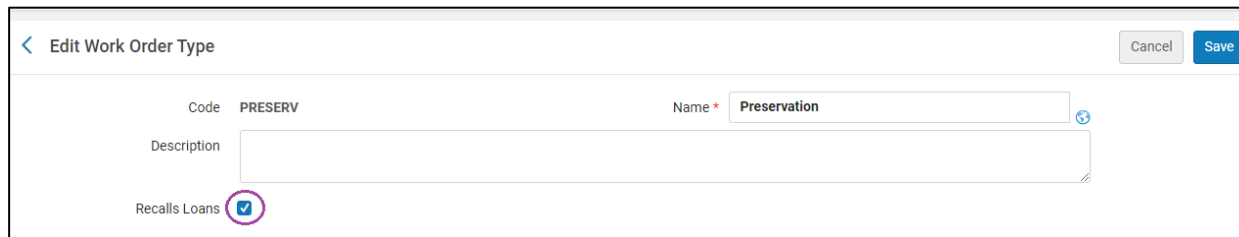
# Configuration – (1) Work Order Type

- Define the **purpose** of the Work (restoration, binding, digitization, etc.)
- Configure at the Institution or Library level
- Create it in: Configuration > General > Work Orders and Departments > **Work Order Types**



# Configuration – (1) Work Order Type

- Decide whether the request can “recall” the item if it is on loan
- Alma will send the user the “Loan Status Notice” letter, if enabled at your institution.



The screenshot displays the 'Edit Work Order Type' configuration interface. At the top left, there is a back arrow and the text 'Edit Work Order Type'. At the top right, there are 'Cancel' and 'Save' buttons. The form contains the following fields:

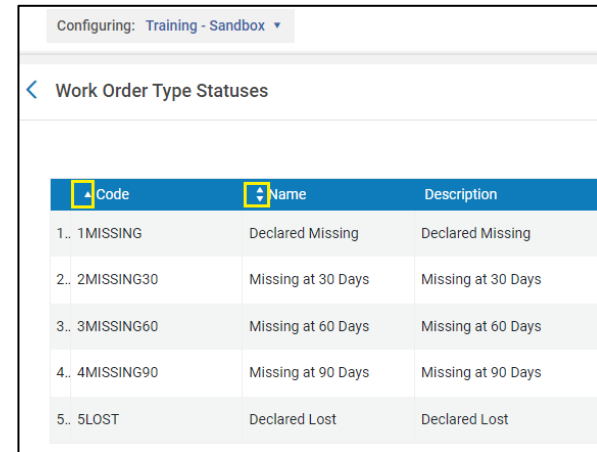
- Code:** PRESERV
- Name:** Preservation (with a dropdown arrow icon)
- Description:** An empty text area.
- Recalls Loans:** A checked checkbox, which is circled in purple in the image.



# Configuration – (2) Work Order Statuses

- Define the **phases** of the work
- In: Configuration > General > Work Orders and Departments > Work Order Types > "Actions" > **Manage Statuses**

- Statuses are sorted by Code or Name
- Statuses are not mandatory



Configuring: Training - Sandbox ▾

< Work Order Type Statuses

Code	Name	Description
1.. 1MISSING	Declared Missing	Declared Missing
2.. 2MISSING30	Missing at 30 Days	Missing at 30 Days
3.. 3MISSING60	Missing at 60 Days	Missing at 60 Days
4.. 4MISSING90	Missing at 90 Days	Missing at 90 Days
5.. 5LOST	Declared Lost	Declared Lost

# Configuration – (3) Work Order Department

- Where is the work done?
- Configuration > General > Work Orders and Departments > Work Order Types > **Manage Departments**

Work Order Types

[+ Add Work Order Type](#) [🔄](#) [⚙️](#)

Code	Name	Departments	
1 AcqWorkOrder	Acquisitions	-	...
2 DIGI	Digitization	Digitization Department For Institution	...
3 SEARCH	Missing Item Searches	Missing Items Search	Manage Departments Manage Statuses Edit Remove
4 OUTOFCIRC	Out of Circulation	Out of Circulation Defa	
5 PRESERV	Preservation	Institutional Preservatic	

# Configuration – (3) Work Order Department

- **General Details tab:**

- Work Time (days): informational, how long is the item in Department?
  - Value of 0 defaults to 7 days
  - 999999 will mean that there is no estimate

The screenshot shows a web interface for configuring a department. At the top, there are four tabs: 'General Details' (selected), 'Served Libraries', 'Contact Information', and 'Operators'. Below the tabs, the 'Code' field is set to 'CONSMATLAB' and the 'Name' field is 'Conservation Materials Laboratory'. The 'Description' field contains 'Conservation Materials Laboratory'. The 'Work Time(days)' field is set to '2'. The 'Default Printer' dropdown is set to 'Main Desk Printer'. The 'Additional Printers' dropdown is empty. There is also a 'Map' field which is currently empty.

# Configuration – (3) Work Order Department

- **Served Libraries** tab: per configuration, the department will serve the Institution, or specific libraries

The screenshot shows the configuration interface for the 'Served Libraries' tab. The interface is titled 'Configuring: Training - Sandbox'. The 'Served Libraries' tab is selected and highlighted with a purple border. The interface includes a 'Cancel' button and a 'Save' button. Below the tabs, there is a search bar showing '1 - 1 of 1' and a search icon. To the right of the search bar, there are links for 'Attach Library', a share icon, and a settings icon. A table with two columns, 'Name' and 'Description', is displayed. The table contains one entry: '1... Training - Sandbox' with the description 'Training - Sandbox'. To the right of the table, there is a 'Missing Items Search' section with fields for 'Department Code' (SEARCH) and 'Department Description' (Work Order department for searching for missing items).

Name	Description
1... Training - Sandbox	Training - Sandbox

# Configuration – (3) Work Order Department

- **Operators** tab: who can process the items? (Work Order Operator Role)

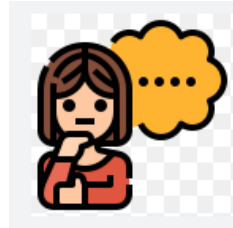
The screenshot displays the 'Operators' configuration page. At the top, there is a navigation bar with a back arrow, the title 'Operators', and 'Cancel' and 'Save' buttons. Below this is a tabbed interface with four tabs: 'General Details', 'Served Libraries', 'Contact Information', and 'Operators' (which is selected and highlighted with a purple border). In the top right corner of the main content area, there is a '+ Add Operator' button (highlighted with a purple border), a share icon, and a settings icon. Below the tabs is a table with a blue header row containing a dropdown arrow and the text 'Name'. The table contains three rows of operator data:

	Name	
1	Administrator, Alma	...
2	Ariel-Joel, Yaala	...
3	Brew, Mike	...



# Configuration – Gathered Experience

- Some find it useful to use one Work Order Type with multiple statuses (to avoid having to create multiple work order requests for one typical workflow)
- For work orders that the Circulation Department uses (missing, for example), make the work order department managed by the Circ Desk - this makes it easier for staff to create work orders and to complete





# Creating Work Orders

# Creating Work Orders - Role

- Create Work Order Requests (Privilege: Requests Creator)
  - Work Order Operator
  - Requests Operator
  - Physical Inventory Operators
  - Receiving Operator
  - Fulfillment Services Operators, Managers
  - Digital Inventory Operators
  - Purchasing Operators, Managers
  - Repository Manager





# Creating Work Orders - How

- Create Work Orders anywhere the Physical Item is in focus
  - Physical Item Search
  - Bib/Holding “List of Items”
  - In the Item Record
  - During Loan / Return (... > Work Order)
  - Via “Scan In” of items
  - Via Jobs
  - Automatically when Receiving and “Keep in Department”
  - Automatically for the Quick Catalog Item form



# Creating Work Orders – Example (1)

- From Physical Items Search > More Actions > “Work Order”
  - Select the Process Type
  - Decide if it needs to show in “Pick From Shelf”

The screenshot displays the library system interface for a book titled "The cactus eaters : how I lost my mind and nearly found myself on the Pacific" by Dan White. The book details include the author, call number (GV199.42.P3 W45 2008), item ID (2388249800000541), barcode (2051387715), and library location (Main Library). The creation date is 02/28/2008 and the modification date is 02/08:43:27 EST. The expected arrival time and on hold expiration date are also visible.

The interface shows the "Place Item in Process" workflow. The "Process Type" dropdown menu is open, showing options: Acquisitions, Digitization, Missing Item Searches, Out of Circulation, Preservation, and Technical Services. The "Digitization" option is selected. The "Work Order" button is highlighted in the top right corner. The "Place Item in Process" form is also visible, showing the "Process Type" dropdown set to "Digitization", the "Do not pick from shelf" checkbox, a "Note" field, the "Managing Department" dropdown set to "Digitization Department For Institution", and the "Manual Priority" dropdown.

# Creating Work Orders – Example (2)

- Or, add Work Order from the “Item Editor”
  - Again, choose the Process Type, and the Department
  - Tip: only possible after the item was saved at least once

The screenshot shows the 'Physical Item Editor' interface. At the top, there is a back arrow, the title 'Physical Item Editor', and two buttons: 'Relink to another bibliographic record' and 'Cancel'. Below the title bar, there are several input fields and dropdown menus. The 'Replacement cost' field is empty. The 'Physical condition' dropdown is empty. The 'Process type' dropdown is set to 'Out of Circulation'. The 'Receiving operator' field is empty. The 'At \*' dropdown is set to 'Out of Circulation Default Department'. Below these fields is a section titled 'Inventory Information'. In this section, the 'Inventory number' field is empty, and the 'Inventory date' field is empty with a calendar icon to its right.

# Creating Work Orders – via Jobs

- To add Work Orders in bulk, create a **Physical Items Set**, and run either **Job**:
  - Create Physical Item Work Orders

The screenshot shows a web interface titled "Run a Job - Enter Task Parameters". At the top right, there is a progress indicator with four steps (1, 2, 3, 4), where step 3 is highlighted. To the right of the progress indicator are buttons for "Cancel", "Back", and "Next". Below the title bar, there is a dropdown menu labeled "Task Parameters: Create Work Order Requests". Underneath, there are two dropdown menus: "Work Order Type" with the value "Preservation" and "Department" with the value "Institutional Preservation Dept". At the bottom left, there is a checkbox labeled "Do not pick from shelf" which is currently unchecked.

- Change Physical Items information

The screenshot shows a web interface titled "Run a Job - Enter Task Parameters". At the top right, there is a progress indicator with four steps (1, 2, 3, 4), where step 3 is highlighted. To the right of the progress indicator are buttons for "Cancel", "Back", and "Next". Below the title bar, there is a dropdown menu labeled "Task Parameters: Update Item". Underneath, there are two rows of form fields. The first row has a checked checkbox, a label "In Process Type", a dropdown menu with the value "Digitization", and a "Condition" dropdown menu with the value "If field empty". The second row has a checked checkbox, a label "Department", a dropdown menu with the value "Digitization Department For Institution", and a "Condition" dropdown menu with the value "If field empty".



# Processing Work Orders

# Processing Work Orders

- Role: Work Order Operator
- Scope of the Department



Scan In item at Work  
Order Department



Edit status for  
next steps



Mark "Done" and  
send to Circ Desk



Circ Desk scans in  
and reshelve



# Processing Work Orders – If need to Pick From Shelf

- If the item is in the “Pick from Shelf” list – Scan In first in the Circulation Desk

### Scan In Items

Scan in Items    Change Item Information

Automatically print slip     Yes     No

Set Status To   

Done     Yes     No

Scan item barcode \*   

Scan request ID

### Please note the following:



- Item has requests: Missing Item Searches.
- Work order: type - Missing Item Searches, department - Manage Locally (Missing Item S

Transit Letter, ELUNA

Your.Department@organization.com  
To Yaala Ariel-Joel

ExLibris

### Transit Letter

Print Date: 03/01/2023- 08:41:05 EST

Request ID: 151693250000541

Item Barcode: 2051387715

We are transferring the item below

**From:** Main Library - Main Library Circulation

**To:** Training - Sandbox - Missing Items Search

**Transfer Date:** 03/01/2023

**Transfer Time:** 08:41:05 EST

# Processing Work Orders – Scan In at the Department

- Now, in the Work Order Department
  - Scan In the item
  - The item may be assigned a Status

Physical Items ▾ Keywords ▾

Home 🔍 Missing Items Search ▾

Scan In Items Manage In Process Items Shipping Items Exit

Scan in Items Change Item Information

Automatically print slip  Yes  No

Set Status To Missing at 30 Days ▾

Done  Yes  No

Scan item barcode \*  OK Create Item

Scan request ID  OK



# Processing Work Orders – Edit the Item directly

- Rather than Scan In, it is possible to edit the item

The screenshot displays the 'Physical Item Editor' interface. At the top, there is a navigation bar with tabs for 'General', 'ENUM/CHRON', 'Notes', and 'History'. The 'General' tab is active. Below the tabs, there are two buttons: 'Relink to another bibliographic record' and 'Cancel'. The main content area is titled 'General Information' and contains two columns of input fields. The left column includes: Barcode (20230501), Material type (Book), Provenance, PO Line, Receiving date, Enumeration A, Chronology I, Description, Pages, Replacement cost, and Physical condition. The right column includes: Copy ID, Item policy, Is magnetic, Issue date, Expected receiving date, Enumeration B, Chronology J, Pieces, and Receiving operator. At the bottom, there are two dropdown menus: 'Process type' (set to 'Preservation') and 'At \*' (set to 'Institutional Preservation Dept').

# Processing Work Orders

- Find the items from:
  - Fulfillment > **Monitor Requests & Item Processes**
  - Or, when In the Department > **Manage In Process Items**

Physical Items Keywords

Missing Items Search

Currently at: Scan In Items

1 - 13 of 13 Title 0 rows selected Generate Barcode Done Change Status

Process Status: All Request Filter: All Library: All

	Title	Identifier	Barcode	Status	Date received for departm	End of Activity	Modif ied By	Modifica tion Date	Requests	Cancelled	Notes	Library	
1	<input type="checkbox"/> A whole new mind : moving from the information age to the conceptual age / Daniel H. Pink.	-	13737073	Declar... Missing	03/03/2...	03/11/2020	con... [A]	03/03/...	No requests			Graduate Library	...
2	<input type="checkbox"/> Catastrophic injuries in sports : avoidance strategies / edited by Samuel H. Adams, Marlene J. Adrian, Mary Ann Bayless.	-	81734	Declar... Missing	03/03/2...	03/11/2020	con... [A]	03/03/...	No requests			Science Library	...

# Processing Work Orders – Manage In Process Items

- **Manage In Process Items:**
  - Filter, select, and –
  - Change Status, Generate Barcode, or click “Done”

Work Order Type \* Missing Item Searches

1 - 3 of 3 Title [Search] 0 rows selected Generate Barcode Done Change Status

Process Status: All Request Filter: All Library: All

	Title	Identifier	Barcode	Status	Date received for departm	End of Activity	Modif ied By	Modifica tion Date	Requests	Cancel led	Notes	Library
1	<a href="#">Creative textile design: thread and fabric. [Translator: Brian Battershaw]</a>	-	654321	-	12/09/2...	12/17/2020	Ex Libris	12/09...	No requests		✓	Main Library
2	Green light / [by] Lloyd C. Douglas.	-	52986	Missing at 60 Days	10/29/2...	11/06/2020	am...	10/29...	No requests			Main Library

# Processing Work Orders – Work with the Item

- Also, from “Manage In Process Items”:
  - Edit the item, Edit to add a note, Update Expiry, Print Slip, “Done”

In Process Items Scan In Items

<input type="checkbox"/>	▲ Title	Identifier	Barcode	↕ Status ↕	Date received for departm	↕ End of Activity ↕	Notes	Library	
3 <input type="checkbox"/>	environments : best practices for nurse educators / Carol A. O'Neil, Cheryl A. Fisher, Susan K. Newbold.	-	15345842	Declar... Missing	03/02/2...	03/10/2020		Science Library	...
4 <input type="checkbox"/>	Environmental engineering : designing a sustainable future / Anne Maczulak.	9780816072002 (alk. paper)	2501313597	Missing at 60 Days	12/06/2...	12/14/2019		Science Library	...
5 <input type="checkbox"/>	Flowering plants : magic in bloom / P. Mick Richardson. ; [introductory essay, Jack Mendelson and Nancy Mello]	-	69242	Declar... Missing	03/03/2...	03/11/2020		S L	...
	Great expectations :			Missing					...

Edit Inventory item

Edit

Done

Update Expiry

Print Slip

# Processing Work Orders – Scan In

- Use “Scan In” to move items between statuses, or when “Done”,

Scan In Items

Manage In Process Items Shipping Items Receiving Items Exit

Scan in Items Change Item Information

Automatically print slip  Yes  No

Set Status To **Analysis**

Done  Yes  No

Scan item barcode \*  OK

Scan request ID  OK

Create Item





# Completing Work Orders

# Completing Work Orders

- Change the Work Order Status to – **Done**
  - In: Manage In Process Items > Select > Done
  - Or, from: Scan In Items > as Done
  - Or, Edit the item and remove Process Type
  - Or use the Job: Cancel physical items requests

Scan In Items

Manage In Process Items Shipping Items Receiving Items Exit

Scan in Items Change Item Information

Automatically print slip  Yes  No

Set Status To

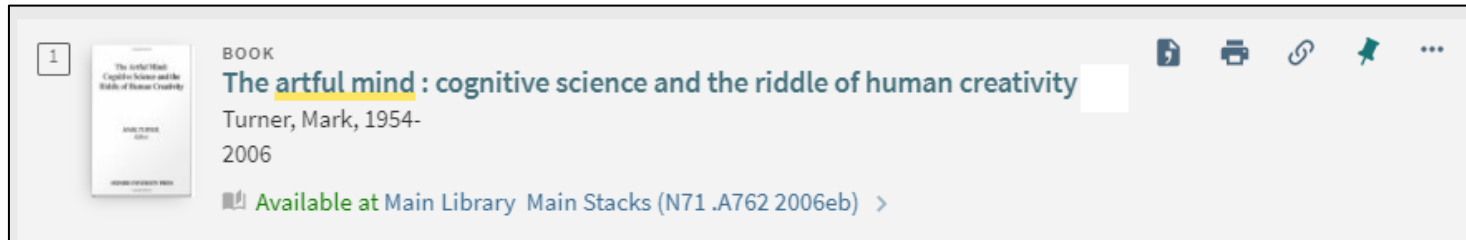
Done  Yes  No



Scan item barcode \*   [Create Item](#)

Scan request ID

# Completing Work Orders – Item Availability

- Item may now be “In Transit” to the Circulation Desk
  - Scan In at the Circulation Desk
  - Or rely on “Reshelve without Transit Rules”
- When the work order department is managed by Circulation Desk and the item is marked “Done”, the item is available



1  BOOK  
**The artful mind : cognitive science and the riddle of human creativity**  
Turner, Mark, 1954-  
2006  
 Available at [Main Library Main Stacks \(N71 .A762 2006eb\)](#) >





# Creating Work Orders – Cancel in Bulk

- To delete Work Orders in bulk:
  - Create a Physical Items Set
  - Run the job: “Cancel physical items requests”
- Or open a case to support, we can assist





# Tips and Tricks

# Linking a Work Order to a Circulation Desk

- A Department created on the Library level, can be linked to a Circulation Desk
  - Add the Work Order Type, Statuses – from the Circulation Desk Configuration

Configuring: Science Library

### Circulation Desk - Work Order Types

Cancel Save

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

Work order type	Work order time (days)
1 science1	5
2 science	0

+ Add work order

Work order type \*  
Science Restoration

Work order time (days) \*  
5

Add work order

You are configuring:  
Science Library

#### Circulation

Code  
DEFAULT\_CIRC\_DESK

Description  
-

# Linking a Work Order to a Circulation Desk

- This will avoid Transit status and changing of “Currently at”
- Click here for a use case enabling “merge” of [Acquisition Department and Circulation Desk](#)

Configuring: Law Library ▾

Department List

1 - 7 of 7 Code ▾   + Add Department ▾

▾ Department Type : All ▾

Code	Name	Description	Department Type	Owner	Managed by Circulation Desk
1 CAT	Cataloging and Processing	-	TechServ	Clean Training	<input type="checkbox"/>
5 DEFAULT_CIRC_DESK-AcqWorkOrder	Law Library Service Desk	-	AcqWorkOrder	Law Library	<input checked="" type="checkbox"/>

# Remove the “Until Date” in Primo

- Solution 1: Configure a Work Order Department to have "999999" in the "Work Time (days)" field
- Solution 2: Remove “until {1}” in: Configuration > Discovery > Display Configuration > Labels > ViewIt Labels > c.uresolver.getit2.item\_list.status.WORK\_ORDER\_DEPARTMENT.with\_expected\_date
  - (Solution 1 impacts new requests)

← BACK TO LOCATIONS

LOCATION ITEMS

Main Library  
Not available , Main Stacks ; GV199.42.P3 W45 2008  
(1 copy, 0 available, 1 request)

In process of Technical Services until 03/10/2023  
Loanable

← BACK TO LOCATIONS

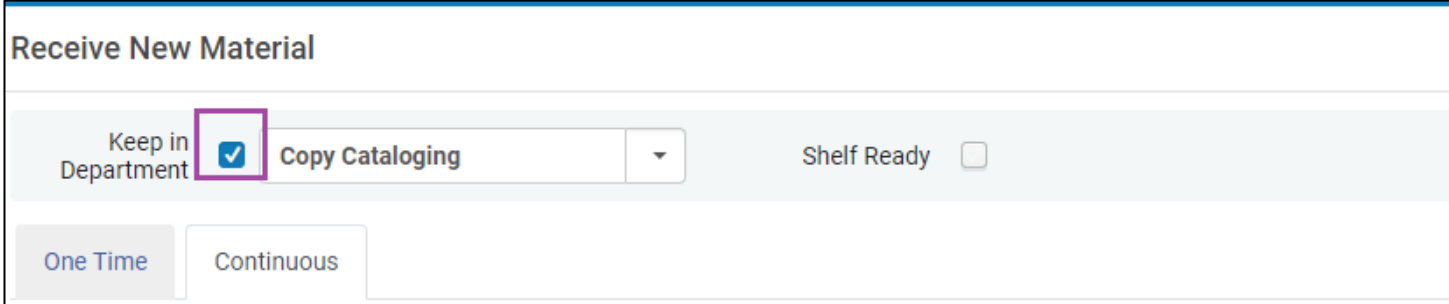
LOCATION ITEMS

Main Library  
Not available , Main Stacks ; GV199.42.P3 W45 2008  
(1 copy, 0 available, 1 request)

In process of Technical Services  
Loanable

# “Receiving > Keep in Department” and Work Orders

- When Receiving ordered items, the “Keep in Department” flag will create an Acquisition Technical Services work order
- The Next Step options are the Statuses configured for the Acquisition Technical Services work order



Receive New Material

Keep in Department  Copy Cataloging  Shelf Ready

One Time Continuous

# Quick Cataloging – Creates a Work Order

- Resources > Add Physical Item
  - This creates a request for Acquisition Technical Services, to be used for complete cataloging at a later time.

The screenshot shows a library catalog interface. At the top, there are navigation buttons: 'Push Selected to MDE' and 'Save and Filter Query'. Below that, there are tabs for 'Institution' and 'Community'. A search bar contains the text 'All Titles (1 - 1 of 1)'. Below the search bar, there are filters for 'Select All', 'Sort by: Rank', and 'Secondary Sort by: Rank'. A table of results is shown with one entry: 'My struggle, Instructor Personal Copy, yaj'. The entry includes a book icon, the title, author 'Knausgård (2022)', language 'English', and a 'Requests: 1' indicator. There are buttons for 'Edit Record', 'Holdings', and a menu icon.

The screenshot shows a detailed view of a request form. At the top, there are filters for 'Activity Status: Active', 'Include Pending Resource Sharing Requests: Yes', and a 'Clear all' button. Below that, there is a table with one entry: 'My struggle, Instructor Personal Copy, yaj'. The entry includes a book icon, the title, and various fields: 'Request Type: Acquisition technical services', 'ID: 1533172610000541', 'Request Date: 03/28/2023', 'Material Type: Book', 'Creator: Ariel-Joel, Yaala', 'MMS ID: 99258516000541', 'Pickup Location: Technical Services (Acq. Dept.)', and 'Barcode: 20230502'. On the right side, there are fields for 'Place in Queue: 0', 'Workflow Step: Pickup From Shelf', 'Process Status: New', 'Managed By Library: Main Library', 'Managed By Desk: Main Library Circulation', 'Process Date: 03/28/2023', and 'Expiration Date: 04/04/2023'. There are buttons for 'Cancel', 'Print Slip', and a menu icon.

# Error: “Failed to create work order”

- When adding an item through: Resources > Create Inventory > Add Physical Items, an error is seen: “Failed to create work order to Acquisition Department”
  - Suggestions, in this [Knowledge Article](#):
    - Add the new Location to the Circulation Desk Configuration
    - Enable the Circulation Desk to be Primary
    - Make sure the Desk has “Hold Shelf” configuration



# Binding items will create a Work Order

- When Binding items, choose the Work Order Type
  - The new bound item is In Process, handle it accordingly

List of Items

1 - 7 of 7 Barcode  Search Sort routine 2 rows selected Manage Selected + Add Item Settings

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

<input type="checkbox"/>	Barcode	Library	Location	Call Number	Item Call Number	Year	Volume	Description	Temporary Location	Status	Issue Number	Receiving date	
<input type="checkbox"/>	66226-6	Main Libr...	Main Periodicals	TJ940 .J668	-	2020	37	v. 37 no. 6 (2020 June)	No	Item plac		06/24/2...	...
<input type="checkbox"/>	66226-7	Main Libr...	Main Periodicals	TJ940 .J668	-	2020	37	v. 37 no. 7 (2020 July)	No	Item plac		06/24/2...	...
<input type="checkbox"/>	-	Main Libr...	Main Periodicals	TJ940 .J668	-	2020	37	v. 37 no. 8 (2020 August)	No	Item plac		06/24/2...	...
<input checked="" type="checkbox"/>	2051387731	Main Libr...	Main Periodicals	TJ940 .J668	-	2021	39	v. 39 no. 1 (2021 January)	No	Item plac		03/28/2...	...
<input checked="" type="checkbox"/>	2051387732	Main Libr...	Main Periodicals	TJ940 .J668	-	2021	39	v. 39 no. 2 (2021 March)	No	Item in place	-	03/28/2...	...

Bind Items

- Change Holdings
- Open Predicted Items
- Relink to another bib
- Withdraw Items
- Add to Itemized Set
- Clear Selection
- Create Itemized Set
- Run a Job

Journal of vacuum science & technology. A, Vacuum surfaces, and films : an official journal of the American Vacuum Society. Published for the Society by the American Institute of Physics, New York : 2nd ser., v. 1, no. 1 (Jan./Mar. 1983)- [0734-2101]

Location  
Main Library: Main Periodicals; TJ940 .J668

MMS ID  
99240141400521  
View all holdings

# Wrap up thoughts

- How to remove the Work Order?
  - (Hint – make sure no Work Order Requests exist, and delete the Work Order Type)

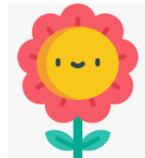




# Documentation

# Documentation, Training, Apps

- Online Help: [Configuring Work Orders and Departments](#)
- [Training Video](#)
- [Knowledge Articles](#)
- Extended Training:
  - [Defining and managing work orders in Alma.pptx](#)
  - [How to add an additional process type to Alma using the Work Order functionality.pptx](#)
  - [Using an acquisition work order when receiving an ordered item.pptx](#)
- For Scan In apps, see: [How to activate and use the Bulk Scan In cloud app](#)





# Thank you!

---

EX LIBRIS  
*Knowledge Days*

ExLibris<sup>®</sup>  
Part of **Clarivate**