Work Orders Overview

Key Concepts and Terms

- **What they are:** Work orders are a way to **track where physical items** are as they move through different kinds of library processes. They’re only used for physical items.
- **How they work:** Work orders use internal library requests to route physical materials through that processing. This way, materials are displayed as *not on shelf* to patrons in HOLLIS while staff can see exactly where they are. Patrons can place a request while an item is in a work order, just like they can when an item is on loan to another patron.
- **We can think of Work Orders like transit systems in a city:** an item enters the path of a work order, moves from station to station along the line until all of the processes are done, then goes back to its home library or on to another destination.

Work Orders Module - Alma Overviews Online Course

For an overview of Work Orders, and to see them in action, please view the [Work Orders module](#) of the Alma Overviews Online Course.

Definitions

- **Work orders:** staff-initiated requests for internal processing of physical items. When an item record needs to undergo some kind of library processing (e.g. Shell Prep) a work order is used.
  - They replaced the function of pseudopatrons from Aleph, as well as some of the Aleph item processing statuses
- **Work Order Types:** these represent workflows such as Technical Services, Preservation, Digitization
- **Work Order Statuses:** these represent phases within a Work Order Type
- **Work Order Departments:** these are the physical locations where the work occurs. Usually these are associated with a library, though some are institutional level departments to which all libraries send materials.
- **Operators:** staff members with permissions to change the status of items in their department

Important Notes about Work Orders

- In many locations, the Work Order Type is displayed as the **Process Type** for the record. On some screens the Work Order Status will also display, e.g. **Process Type: Tech Services (Processing Area)**
- Work orders are **considered a type of request** in Alma:
  - It will show on the Monitor Requests and Manage In Process Items screens
  - When an item is in the Tech Services workflow, it will show up as having 1 request, which represents the current Tech Services work order for that item.
- The **Manage In Process items screen** is where you can see all items assigned to your department by work orders. The Receiving Department items is the same screen as the Manage In Process items screen.
- **If an item is on Loan, using the Scan in Items option will discharge it.** If you need to look up an item to initiate a work order, use the Physical Items search by barcode or other identifying information.
- **Notes on Queue Priority:**
  - If there are multiple patron requests in the queue and the item needs to go to a department immediately after the current patron returns it, do not initiate a work order. Instead, add a Fulfillment note to the item for Circulation staff.
  - **If an item is on Loan or In Transit,** adding a Work Order does not recall it from that patron. It will need to be returned by that patron, then the Work Order request will take effect.
  - **If Circulation Desk/Stacks Retrieval staff observe or suspect mold** or similar issues with the item, **do not circulate it to a patron or put it in transit to fill a request.** The item should immediately be put in a sealable plastic bag and staff should create a preservation work order to send the item to the appropriate Preservation department. Preservation will work with Access Services to notify the requesting patron if the item can be cleaned for use or not.
Role of your Currently At

- It is very important that you set your Currently at location to the department in which you are physically present. This is how Alma knows where to transit the item to when you're done with it.
  - Example: If you are Currently at the Preservation Department and you mark an item as Done, Alma will automatically put it in transit to its home library.
- Your Currently at department also controls which items you will see in the Manage In Process Items screen. You will only see items that are in currently your department.
- Only staff “at” Technical Services departments can receive items in the acquisitions process (or Circ Desks that are configured to serve as Tech Services Departments).

Scan In Items vs. Return Items vs. Using Search

Do not use either Scan In or Return Items unless you have the piece in hand. Always use a Physical Items search if you are working from a written or typed barcode. If you use Scan In Items or Return Items, you will discharge any loans on the item and may complicate the request priority queue.

- Use Scan In Items if you are scanning an item into or out of your department.
- Use Return Items at Circulation Desks or to return a loaned item in another department.
- Use a Physical Items search if you do not have an item in hand and either want to initiate or check on the status of a work order.

Notifications About Requests on Items in Work Orders

There are currently no pop-up notifications alerting Alma users to pending requests when updating an existing work order, including when marking it Done.

- LTS has logged an Alma request for ExLibris to have Alma generate a message when a user updates the work order of an item that has a pending request.

The only signal users receive regarding pending requests is when marking a work order Done is that if there is a request in queue, instead of saying the item is in transit to the owning library, it will say the item is in transit to another destination for a Library or Patron request.