Work Orders Training Materials

Spring 2019 Update
The scripts and training materials in this section were used by Alma peer trainers & facilitators during the active Implementation project phase (April 2018 - June 2019).
These materials are now archived and may contain outdated information/past practice - do not use as-is. This content was last updated February 2019.
For current Alma training, please visit the Learning Alma - for Staff and Managers page.

Pre-Work, Examples and Handouts

Pre-Work

**Required Classes:** Alma Overviews, 1- and 2-level classes in Fulfillment, One-Time Orders, and/or Continuous Orders

**Pre-Reading:**
- Work Orders
- Work Orders Staff Documentation - Job Aids
- Requests (for an overview of how requests work in Alma)
- Any of these relevant to your work:
  - Receiving a One-Time Order
  - Receiving a Continuous Order: Standing Orders or Receiving a Continuous Order: Print Journals or Physical Subscription
  - Fulfillment Work Orders

Examples and Handouts

- Work Order Types Map
- Work Orders Handout
- Interacting with Work Orders options chart

Trainer Preparation

In the sandbox, you have the same roles, permissions, and location options as you did in Production as of September 1, 2018. Please read through this script and find or create examples that match your location, permissions, and the people you are training as closely as possible. Trainer directions are in green, like this text.

Class Script

Introduction

**What Are Work Orders?**
- Key Concepts and Terms
- Basic Steps

Examples of Work Orders
- Part of the Receiving Process – “Keep in Department”
- At Access Services/Circulation service points – send to Preservation/Collections Care
- Scan in Items at Departments – Tech Services, Preservation/Collections Care
- Item is Not In Hand - Digitization, Special Projects

Troubleshooting Work Orders
- Fixing Accidental Work Orders and "Dones"
- Transferring Departments/Sequencing Work Orders
- New Acquisitions Not Marked Done

Managing Work Orders
- Checking on a specific item
• Resource Request Monitoring – in all departments/locations
• Manage In Process Items – in your work order department

Review & Closing

Introduction

Today, we’ll review Work Orders in Alma and how they are being used at Harvard. We’ll discuss key concepts; step through the basics of initiating, managing, completing, and troubleshooting work orders; and mention a few notes. There’ll be time for questions and practice throughout the class, and again at the end.

First, a few reminders:

• We are in our fourth month live with Alma and are refining how we use it, especially new features like Work Orders.
• Please keep using the LTS Alma Support form to ask questions and report issues. The link is in the Notifications widget in Alma, along with the link to Alma documentation on the LTS wiki.
• We’re still training on Alma as a tool, and while there is usually more than one way to do anything, we will show you the verified or preferred way to do tasks. Once you’ve learned the best practice, we encourage you to discuss local procedures and workflows in your units or in Learning Circles.
• On that note, if you or your staff use a shared login, permissions might be different from what you see here, so make sure you check in Production and see which version of these suggested steps work for you and your unit.

Some quick logistics information:

• The nearest bathrooms & water supply are:
  - 90 Mt Auburn: Two restrooms are on the opposite side of the building on the basement level, water is in the kitchenette and in a fountain by the restrooms
  - 625 Mass Ave: Restrooms are at the opposite end of the building on the 3rd floor, by the water fountain
  - Please ask questions when they come up; I will also pause between sections for questions and to make sure things are clear.

Let’s start by introducing ourselves. (Go around the room and ask everyone to share their name, library/unit, and how this class relates to their work.)

Now, if you haven’t already, please log in to Alma. After you log in, you can follow along or watch until it’s time to practice.

We’re going to begin by talking about the key concepts and basic steps of work orders.

What Are Work Orders?

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.

Parts of a Work Order

Let’s look at the map handout to talk about the parts of a work order.

The Work Order Type or Process Type indicates the type of library process to be carried out on an item. It’s like the transit system in our analogy.

Harvard currently has seven Work Order Types:

• One Technical Services Work Order
• Three Preservation Work Orders: Preservation (Collections Care), Weissman Preservation Center, and Imaging Services
• Three Fulfillment Work Orders: Borrow Direct, InterLibrary Loan, and the Single-Copy Project.

Note that we’ve included Circulation on this map. It’s not a Work Order - it’s an automated workflow - but it uses similar terminology and also tracks where physical items are (on Loan to a patron, in transit from one location to another, etc.).

The Work Order Statuses are the phases or steps within a Work Order Type. They’re our stops or stations along the line, and items move from status to status until all the work is completed. Some work orders use statuses to track different phases of work, some to identify specific work an item needs, and some just to ‘check in’ the item to that department.

Work Order Departments or Managing Departments are the physical locations where the work occurs, like neighborhoods in our transit analogy. Each work order type (or transit system) has different lines, but similar stops along the route.

• For instance, in the Tech Services line, you might have ITS@Langdell or ITS@625, or a local unit’s Tech Services department, using the same work order with the same statuses: Cataloging, Processing areas, and Shelf Prep.
• In Preservation/Collections Care, the different Collections Care units all have the same statuses, including “unknown substance.”
Basic Process

There are four basic steps to any work order:

1. **Identify the item** in Alma, and possibly see if there are any patron requests on the item.
2. **Initiate the work order** and send it to the Managing Department, if necessary.
3. At the Work Order Department, **staff move the item through the work order steps**.
4. When the work is complete, **staff mark the Work Order as Done** to return the item to its owning library or to fill another request.

The details vary from Work Order type to type, and you can stack up a sequence of work orders, but this is the general process. Let’s go through a few examples.

Examples of Work Orders

Part of the Receiving Process – “Keep in Department”

**TRAINER:** You can either just choose an example from any item on your unit’s receiving list, or you can create an order ahead of time to receive. Remember that this is the Sandbox, so you can receive any item without affecting the real records.

One area that uses work orders is Acquisitions, during the Receiving process. Here, work orders are used to move items out of an automated workflow and into a staff-initiated work process.

The difference between workflows and work orders is that with workflows, Alma automatically changes or updates details as the process moves along. When an item is ordered, for instance, it’s given the process type of “Acquisition” by the system. When it’s received, that process type will change automatically to Transit (to the owning library) unless someone decides that it needs more work. At that point, they can move it from the automated workflow and into a staff-initiated Work Order, by choosing “Keep in Department.”

Let’s go through the receiving process to see how this works:

1. First, make sure your **Currently At** is set to a Tech Services department.
2. Click on **Receive** under the Acquisitions menu to see a list of all the materials available to be received by this unit. (Note, there are a few ways to get to this point, please take One-Time or Continuous Orders 2 for more on this.)
3. At the top of the list, there is a check box next to **Keep In Department**. If this box is checked, you will see a list of Work Order Statuses for the Technical Services Work Order Type. This is where it comes out of the automated workflow and enters a staff-initiated Work Order. Choose the next step in the “Tech Services” line for this item and continue:
   a. If we uncheck Keep in Department, then as soon as we finish receiving the item (and doing small changes like adding a barcode or item-specific information), it will be appear in the catalog as In Transit to the owning library. This is part of the system-driven workflow. So, if anything is not to be done to the item after it’s received, mark it as Keep in Department.
   b. Note that when we do check off Keep in Department, Alma selects the Work Order Type and the Managing Department for us, based on our “currently at” location. We are only selecting the work order status, or stop.
4. Find an item in the receiving list to receive. Write down the title to look up after we’re done, and tick the box next to the title.
5. Click **Receive** at the top of the page to receive the item.
6. You will probably see a pop-up that says that the item has been received and is in transit to the owning library, or marked as On Shelf in local units.

Now, let’s do a quick search to see what this did. Choose a Physical Items search, and search by the title. Find the item in the list of results and see that the Process type (our transit line) says Technical Services Work Order and the first stop in parentheses. You can also see the Managing Department from here.

A note: As soon as someone in a receiving department receives the item, only staff in the **same** department will be able to change the status of the Work Order or mark it as Done. (aka, only people working on that “line” can assign and change the specific “stops” it goes to).

- For example, both ITS and Judaica serve Widener Library, therefore they both see Widener items in the Receiving Workbench.
- If Judaica receives the item, only Judaica can manage the item after that point.

At Access Services/Circulation service points – send to Preservation/Collections Care

**TRAINER:** Set location to a Circulation Desk. Have a barcode for an item on loan ready to return. (Check an item out to yourself in the sandbox if needed.)

Now, let’s try another common situation. Let’s imagine that a patron returns an item to a Circulation desk that is clearly in need of repair. Once the appropriate person at the desk decides that the item should be sent to Collections Care, they can initiate a Work Order for that item from the Returned Items list.

1. Choose Return Items from the Fulfillment menu
2. Scan in the item barcode - I’ll type/paste it in, but normally it’s scanned.
3. One of two things will happen:
   a. The item will be returned and will appear in the list of recently returned items on this screen.
b. There will be a request for the item and a pop-up will tell the operator where to place the item in transit to. It will also appear in the list of recently returned items with that destination in the Next Step column.
4. Find the item in the list of recently returned items and choose Work Order from the row action item list (the ellipsis icon).
5. Choose the Process Type (our Work Order type or transit line) of Preservation Work Order. Note that you can't choose a status, just the work order type.
6. Next is the "Do not pick from shell" box, which will either add this item to a pick (or pull) list to be retrieved from the stacks, or no. This is an unfortunate double negative, but here's what you do:  
   a. If you have the item in hand, tick the box. It doesn't need to be picked from the shelf, you already have it.
   b. If you didn't have the item in hand, you leave it unticked so it will be retrieved from the shelf.
7. Now, add a note describing the damage to the book or repairs it needs. Try to be more specific than "It's sticky."
8. Select the Managing Department - in this case, which Collections Care unit it should go do.
9. Click Submit.

So, what if there had been a patron request for the item?

Until late October, the work order documentation online said that if you place a Work Order request, it would take priority over patron requests. The Ex Libris documentation says the same thing. However, this is actually a configurable setting, and Harvard has chosen to make work order requests the same as patron requests. (Jennifer, they are not exactly the same – because patron requests will issue a recall notice, work orders will not...Maybe just say “the system has been configured to fulfill requests in the order they appear, with patron requests generating "due date change" notices or recalls, and work orders not.”) If there is a patron request on the item, you can place the item in transit to fill that request and then place a work order request; once the patron returns the item, it will go to the Managing Department and get the work done.

If there is more than one request, then the work order request will be filled whenever it is the next request in the queue.

You can - with extreme judgement - force the work order request higher in the queue, if the work is important enough. However, this will not recall an item from being on Loan - the patron still needs to return the item before the work order request will take effect.

1. Look up the item in a Physical Items search and click on the number next to Requests to get to the request queue.
2. In any request, click on the number next to Place in Queue to get to the queue itself.
3. Find the work order request in the list and click on the row action item list icon.
4. Click on Activate.
5. This request is now first in the queue and displays a Forced priority.

Scanning In an Item to Your Own Department

If you have the item in hand and you want to initiate a work order for your own department, it's very straightforward and uses a new screen: Scan In Items. Scan In Items functions similarly to how the Receiving list functions - Alma detects your type and your managing department from your Currently At location, and lets you select a specific work order status. If you're in a Work Order Department, you'll use this same screen to move items along the work order (along the stops on the line).

Only use Scan In Items for an item you have in hand.

Scan In Items is useful because it lets you select or update the specific status for an item, and because it will discharge any Loans on the item at the same time (these might be Loans to pseudopatrons or to real patrons, if they weren't discharged properly at the Circ desk). Note that the opposite isn't true: Returning an item at a Circ desk will not clear a work order; the work order must be marked Done by the Managing Department to be completed.

To use Scan In Items:

1. Make sure your Currently At location is set to a Work Order department. TRAINER: I'll use Collections Care (Widener).
2. Navigate to the Scan In Items screen either from the Fulfillment or Acquisitions menus - they go to the same place.
3. Choose the status, the first or next stop on the line. TRAINER: I'll choose Pocket.
4. Leave Done set to No, because this work order is not complete yet.
   a. These settings are sticky, so I could scan in all the items I have that need new pockets one after another without clicking all this again.
5. Scan in the item barcode. TRAINER: I'll paste in my barcode, but it's always better to scan so you don't make a typo. If you don't have a scanner, contact LTS Support and let them know.
6. The item is now Scanned In at your department. You can't Scan In an item at any department other than ones you have permissions for.

Let's say I do my work to the item and need to move it on to another area in my department. I hand it to them, and they go to Scan In Items, and repeat the process for their area.

TRAINER: Repeat steps for another status in the same department, such as "Unknown Substance" for Collections Care.

While we're on Scan In Items, let's quickly see how to mark a work order as Done.

Mark the Items as Done

When all the work on the item in that department is complete and the item is ready to go back to its home library:

1. Go to Scan In Items
2. Ignore the Set Status To line
3. Make sure the dial next to Done is set to Yes
4. Scan in the item barcode
5. Click Ok or hit the Enter key

The item will now be put In Transit until it is scanned in by the Circ Desk of the home library. Send it back to the library according to local process.
Jennifer, the Scan in Items screen at Circ desks looks different than the one for Tech Services or Preservation – including that it does not have an option to "Done" things. Mention/show/explain this?

Initiating Work Orders When You Don’t Have the Item in Hand

So far, we’ve looked at initiating or managing work orders when you have the item in hand. You can also initiate a work order for an item that’s still on the shelf, or in the middle of some other process. You might be sending items to be digitized, or to be re-cataloged, assembled into a box, or some other process.

If you have just a few items, it makes sense to initiate the work orders yourself. If you have many items, you can contact LTS Support for suggestions on more efficient ways to do this using sets.

Let’s step through this process, beginning with a Physical Items search:

1. Choose Physical Items as the search type
2. Choose whatever criteria you have (barcode, title, MMSID, ISBN, etc.)
3. Click Search or hit the Enter key
4. Identify the correct item from the search results list
5. Choose Work Order from the row action item list
6. Choose the Process Type from the drop-down list. TRAINER suggestion: Create a Tech Services Work Order.
7. Leave “Do not pick from shelf” unchecked, because you definitely want the item retrieved from the shelf and sent to the Managing Department.
8. Add a note. TRAINER suggestion: In this case, I’ll add that I need this delivered to my managing department, because cataloging cleanup is needed. So I’ll say “For Jennifer; possible duplicate, check edition”.
9. Choose the Managing Department. TRAINER: Choose the appropriate Tech Services unit.
10. Click on Submit in the upper right corner to initiate the work order.

Notice that once we choose Work Order, it’s the same process as the staff at a Circulation Desk see.

Because we indicated that item needs to be pulled from the shelf, it will appear on the pick-list for the home library and retrieved like any other request. When it’s scanned in by Circ staff, the system will mark it as In Transit to the Managing Department you selected.

Use the Physical Item Editor

There is one more way to initiate or update a work order using the Physical Item Editor to change the process type and department. However, with this method you cannot assign a Status (which may affect your Analytics) and it bypasses the transit steps. It’s recommended to use any of the other methods we’ve covered, but this way will work.

1. Find the item using the Physical Items search above.
2. Open Physical Item Editor
3. Update Process Type and Department
4. Save item
5. Item is now “at” your department

I’m not going to save the item this time, so I don’t have to fix this later.

Practice Time! Let's practice initiating a work order, moving an item along the process, or marking the work order as Done. Use the search on your example handout to find a barcode, then choose the initiation sequence relevant to your work - as part of Receiving, from the Circulation Desk, or by a search. Initiate the work order, move it from one status to another, and/or mark it as Done. If you have any questions, please ask me.

TRAINER: Leave about 10 minutes for this practice and questions.

Okay, now that we’ve practiced the basic processes, let’s look at some troubleshooting and how to monitor work orders. We’ll start with troubleshooting.

Troubleshooting

Fixing an Accidental Work Order

If you create a work order by accident…

…and the item is in hand and belongs to your unit:

1. Mark the work order as Done, which sets the item to In Transit
2. Give it to the Circulation Desk or set your Currently At to the Circulation Desk
3. Scan in the Item to mark the item as In Place
4. Reshelve
5. If the item is a Remote Storage item, send back to the remote storage location (assuming the item is in hand).

…and the item was requested from another non-Remote Storage location but it hasn’t been acted on yet, you can just click on the Cancel button to cancel the work order and request.
Jennifer, I think it would also be ok to click cancel if the work order is not the next request in queue (if it's further down in the queue, so it's not possible that any action would have been taken on it yet – does that sound right?

…and the item was requested from another location or Remote Storage and the Workflow Step is Transit Item:

1. Do NOT click Cancel. This will only cancel the request, but leave the item in the work order department. Once the item is in the work order process, that process needs to be marked Done before it will return home.
2. Wait until it gets to you
3. Mark the work order as Done, which sets the item to In Transit
4. Send it back to the owning library’s Circulation Desk or the owning Remote Storage location
5. They will scan in the Item to mark the item as In Place and reshelve

…and the item was requested from a Remote Storage location:

♦ If the Workflow Step is Waiting For Remote Storage
   1. Use the Requests search type and the Request ID to find the request OR
   2. Go to Fulfillment >> Monitor Requests & Item Processes and search for the request in that list
   3. When you find the request, click on the Cancel button to cancel both the work order and request.
      a. This will work because the work order/request has not been sent to Remote Storage yet.
      b. In this scenario, the “Do not pick from shelf” box was NOT checked at the time the work order was placed.

♦ If the Workflow Step is In Process
   1. Use the Requests search type and the Request ID to find the request OR
   2. Go to Fulfillment >> Monitor Requests & Item Processes and search for the request in that list
   3. When you find the request, click on the Cancel button to cancel just the request.
   4. Send the barcode to LTS Support (using the Support form) for Remote Storage status correction
      a. In this scenario, the “Do not pick from shelf” box WAS checked at the time the work order was placed.

Fixing an Accidental Done

If you mark a Work Order as Done prematurely, set your location to the Work Order Department and use the Scan In Items screen to set a status, then scan in the item. Because you’re in the department for which you need the work order initiated, this will just start a new work order for the right place.

Use this same method if you are in Technical Services, have Received a new item and forgot to check Keep in Department.

Transferring an item in hand to another department or another work order type

If an item is in a work order for one Department and another Managing department of the same Work Order Type scans it in, the original work order is automatically transferred from the original department to the department that scans in the item.

Example: An item is in the Judaica Tech Services Department. A staff member at ITS 625 Tech Services scans in the item. The Judaica work order is transferred to ITS. This can be done on purpose to move items from one Tech Services department to another; if it is done accidentally, scanning the item back in at Judaica will transfer the work order back again.

If an item has had all its work completed in your department and you need to send it on to work in another Managing Department:

1. Initiate the new work order request on the item.
2. THEN, mark the current work order Done, and the item will automatically be en route to the next work order.
   • Note that there are no statuses or stops that cross more than one line (like Downtown Crossing).
3. If you accidentally mark the item Done first, just scan it in again to your department on the Scan In Items screen, initiate the new work order, and then mark the current work order Done.

Example: An item is already in a Collections Care work order process, and you determine that it also needs updated cataloging. You can look up the item using a Physical Items search, select Work Order from the row action item list, and initiate a Technical Services work order straight to Cataloging. Once the Collections Care work is done, it will be sent for that cataloging, and then returned to the shelf or sent to fulfill a patron request.

New Acquisitions Not Properly Marked as Done

Sometimes, staff at a Circulation Desk or are Access Service receive a group of new items for shelving that all display alerts that they need to be returned to ITS or a Technical Services department. If this happens, they may not have been properly marked as Done during the receiving process. Circulation staff cannot mark the work order for these items as Done, because they are not in the proper work order department.

If this happens, Access Services staff can reach out to a Technical Services/ITS contact and email the list of affected barcodes to be marked Done.

Any questions?
Managing Work Orders

Next, let's look at how you manage work orders, starting with individual items, then items in your department, then requests for all units.

Check an Item’s Status and History

If you want to see a quick snapshot of an item's current details, search for it using a Physical Items search. You’ll see what status the item is in, Requests on that item (including work order requests), and more. **Reminder:** only use Scan In Items for an item in hand, so you don’t accidentally discharge a Loan.

If you want more details, click on Edit Item or on the barcode to get to the Physical Item Editor. Whether your permissions allow you to actually edit that item doesn’t matter; you can view the Item History and see all item changes, holdings changes, and Fulfillment activities (loans and returns). This history includes the Operator identifier, so you can see who the last staff person to touch an item was.

- In Alma, **Operator** is the role for any staff member with permission to change things. In the case of Work Orders, Operators have permission to change the status of items in their department.
- The **Creator** is the person who initiates the work order. The initiator (“Creator” in Alma) on the work order doesn’t change as other staff work on it or mark it Done. Other Operators will be listed as having worked on it in the Item History section, but the Creator remains the same.

Jennifer, we’re discovering that if someone just scans in an item to move it to another stop within the same line, without making some changes to the item /holdings/bib, they are not showing up in the item history at all....Honor has been testing this.

Manage In Process Items

To manage items that are at your department, use the **Manage In Process Items** function. You can get to this option from the Fulfillment menu (Manage In Process Items) and the Acquisitions menu (Receiving Department Items). These two menu choices will both take you to the same list.

- This list will be limited by your **Currently At** location, so make sure you’re set to the right place. You can also change your location after calling up this list and the list will update to reflect your new location.
- Use the search bar at the top of the list (not the persistent search bar, but the search bar under the words “In Process”) to find specific items by barcode, title, or other identifier.
- Use the filters beneath the search bar to limit the list to a particular process status or library, or to see which items have requests or interested users attached to the records.
  - Again, here you see work order requests referred to as “library requests” in the requests filter
  - Beyond a list of what items are in what status in your department, you can also use the In Process list to change the status of multiple items at once.
  - Mark the tickybox next to each item in the list you want to update, then use the Change Status option at the upper right.
  - To mark multiple items as Done, check the tickyboxes to select the items, then click on Done in the upper right.
  - You can also manage individual items from this list. Use the row action item dropdown on the item row to change its status, mark as Done, print a slip, edit the item, or more.
  - If needed, you can Export the entire list to an Excel spreadsheet, as with any other list of results.

Resource Request Monitoring

If you have initiated a work order for many items, you can monitor the process of those items in the Resource Request Monitoring list. This list is library-wide, so it will be quite large and must be limited.

1. From the Fulfillment menu, choose **Monitor Requests & Item Processes**
2. Use the facets on the left to limit the list; this order of limiting will get you your results most efficiently:

   - **Request/Process Type** – choose the process type you want to monitor
   - **Owner** – your library/unit, or the library whose item is tied to the request
   - **Pickup Location** – the department that items are at
   - **Workflow Step** or **Workflow Step Status** will return a list of all items at a particular stage, so you can see what is at that point in the process
   - **Material Type** will return a list by material type, if you sent a particular collection
   - **Request Date** will let you know what’s gone recently or has been gone longer than a month
   - **Days in Department**

   The dates that display here are specific to the work order type/status, and are set by LTS. They can be changed, and currently nothing happens when a library request “expires”. (More info below in the “Days in Department” section.)

   From this list, you can get a snapshot of what items are at what points in their processing, or you can choose from any of the actions in the row action item list:

   - **Cancel** – Cancels a work order request. It does NOT recall the item automatically, and it only cancels the entire work order if the item is still in the same place it was when the work order was created.
     - We covered this a minute ago in the troubleshooting section, but again: once the item is in the work order process - even just pulled from the shelf and on its way to you - that process needs to be marked Done before it will return home and stay there. Otherwise, the item will bounce back and forth between the owning library and your department and no one will know where it belongs.
   - **Edit** the request
   - **Update the Expiry Date** for the request
     - The dates that display here are specific to the work order type/status, and are set by LTS. They can be changed, and currently nothing happens when a library request “expires”. (More info below in the “Days in Department” section.)
   - **View the Audit Trail** for the item and see when it entered or left a particular status
If you want to, you can always `Export` the results of your list to an Excel file for further review.

**Practice Time!** Take a moment to check on the work orders you initiated earlier using a Physical Items search, Manage In Process Items, or Resource Request Monitoring.

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### Review

<table>
<thead>
<tr>
<th>Functional Area</th>
<th>Use the Row Action Items List (Ellipsis icon)</th>
<th>Use Scan In Items Screen</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fulfillment</td>
<td>Return Items - Circ staff notice item needs repair or other work, initiate work order from returned list to send item to Collections Care/Tech Services</td>
<td>Borrow Direct/ILL - Item is in hand and you need to scan it in to your department</td>
</tr>
<tr>
<td></td>
<td>Borrow Direct/ILL/Single Copy Project - Use Physical Items search and initiate work order from results/item record to have item sent to your department</td>
<td>Borrow Direct/ILL/Single Copy Project - Item is in hand and you need to initiate a work order</td>
</tr>
<tr>
<td>Preservation</td>
<td>Imaging Services - Use Physical Items search and initiate work order from results/item record to have item sent to your department</td>
<td>Imaging Services/Collections Care - Item is in hand and you need to scan it in to your department or send it to the next work area</td>
</tr>
<tr>
<td></td>
<td>Collections Care/Weissman Preservation - Use Physical Items search and initiate work order from results/item record to have item sent to your department</td>
<td>Weissman Preservation - Item is in hand and you need to scan it in to your department</td>
</tr>
<tr>
<td></td>
<td>Use Physical Items search to request delivery of an item from another location for cataloging cleanup work, and title needs to be pulled from the shelf</td>
<td>All - Item is in hand and work order needs to be marked Done</td>
</tr>
<tr>
<td>Technical Services</td>
<td>Use Physical Items search to request delivery of an item from another location for cataloging cleanup work, and title needs to be pulled from the shelf</td>
<td>Item is being received and needs additional work (“Keep in Department” option)</td>
</tr>
<tr>
<td></td>
<td>Item is in hand and you need to scan it in to your department, or to send it to the next work area</td>
<td>Item is in hand and you need to scan it in to your department</td>
</tr>
</tbody>
</table>

Anyone can use either a Physical Items search or the Resource Request Monitoring options to check on the status of a work order. Staff in a Managing Department can use Manage In Process Items to review all items in their department.

Marking a work order as Done is always the safest way to complete or clear a work order and send the item on to its next destination.

Work orders are cross-functional tools, and look a little different in each area, but the basic process is the same:

1. **Identify the item**
2. **Initiate the work order**
3. **Move the item through the work order statuses**
4. **Mark the Work Order as Done**

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### Closing

Today, we’ve gone through the steps of work orders, discussed what they are and how they work, learned basic troubleshooting, and how to monitor and manage work orders.

Once again, if you have any questions about Alma, please use the LTS Support Question Form in the Notifications widget to send them to the Support team. This will get your question answered and will add to the LTS Support knowledgebase about Alma. You can also look up the Work Order sections on the LTS wiki for details and reference lists.

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**Any last questions?**

Thank you for coming. After today, you’ll receive an email with a link to an evaluation form. Please take a few minutes to fill it out; your feedback will be invaluable in helping the Training Working Group refine these trainings for the remainder of these early sessions and for the long-term training to come.

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### Additional Information

**TRAINER:** Use these details to answer specific questions, or go through them if you have time after everything else is covered.
There are a number of additional bits of information that will help you as you work with work orders:

**Work Order “Days in Department”**

Every Work Order Department is configured with a number of days for which the item is expected to be in that department after it arrives and is scanned in. The number of days is used to calculate the “Expiration Date” that appears on the Monitor Requests and Item Processing page.

This date does not display to patrons, though that is a configuration choice by Harvard and it is possible to display it.

If you want to adjust the number of days for your department, contact LTS using the Alma Support Form. (Jmg: is there somewhere we can see the list of days in dept settings? JK: Still looking.)

**Use of Technical Services "Circ Desks"**

If you are in a Technical Services unit but also have Circ Desk permissions, do not set your location to the Circ Desk when handling any work order-related steps. You should only set your location as a Technical Services Circ Desk when you are either charging or returning personal requests to staff.

When moving materials from a Technical Services work order to a patron loan, you must mark the work order as Done first. This will automatically

When a patron returns something that was on loan and you want to initiate a work order, you do NOT have to return it first. As mentioned earlier, if you use Scan In Items, you will simultaneously clear the patron loan and scan the item in to your department for the work order.

**Overlapping Work Order and Fulfillment Terminology**

As we’ve seen a few times, there are overlaps in terminology between Fulfillment and Work Order terminology.

In specific, when you’re looking at an item record, you’ll see a Status (item in place or not in place) and if the item is not in place, it will have a process type of on Loan or something else. A work order process type (Work Order type) is one of those other process types. For more on this, see the Item Statuses, Process Types, and Required fields page in the LTS wiki, under Items & Holdings.

**Special Projects and Other Needs**

Work orders can be useful for special projects such as relocations or scanning for digitization. Contact LTS to discuss options.

**HOLLIS Display**

When an item is in a work order process, a patron will see the Work Order Type but not the status. So, they will see that the item is in a Preservation Work Order but not where it is in that process.

Patrons can request items while they are in work orders. Once the work order is marked Done, the item will go in transit to fill the patron request.

**Pseudopatron Loans Migrated from Aleph (procedure for tech services departments only)**

Items on loan to a pseudopatron in Aleph migrated as on loan to the pseudopatron in Alma. Once all the items on a loan to any pseudopatron are processed, and all hold requests made by the pseudopatron are processed, the pseudopatron record will be deleted.

New pseudopatrons cannot be created in Alma, and new loans/requests cannot be made for migrated pseudopatrons.

To initiate a work order for an item that is on loan to a pseudopatron, use the Scan In Items function and set the correct status. Scan in the item to initiate a work order and automatically discharge the Loan.