

## Alma Work Orders Defined

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Here's a short definition of work orders I put together for use at Emory.

### Institutional Level Work Order

- Work order department is under institution organization unit
- Not managed by a circulation desk
- Can serve multiple libraries
  - Will route from department to receiving library when removed from work order unless configured not to do so in the "[Reshelve Without Transit Rules](#)" configurations.
- Department can have multiple statuses
  - You can move items between work order statuses without them going into transit
  - Emory only uses one status for each institution level work order
- Required for use
  - Role of Work Order Operator for work order department
  - Change location to work order department
- Our Institution Level Work Orders:
  - Bindery
  - Digitization
  - Preservation

### Library Level Work Order

- Work order department is under library organization unit
- Can be managed by a circulation desk
  - Acquisitions work order *must* be managed by a circulation desk because it is needed for ordering and receiving orders
- Can serve multiple libraries
  - Will route from work order library to receiving library when removed from work order unless configured not to do so in the "[Reshelve Without Transit Rules](#)" configurations.
- Required for use
  - Role of Receiving Operator for library organization unit
  - From library location, you can scan item into default level of work order
  - From work order location, you can scan item into work order status or change work order status
- Department can have multiple statuses
  - You can move items between work order statuses without them going into transit
  - We use the library-level acquisitions work order for cataloging with multiple statuses
- Emory's Woodruff Library Work Order Statuses

- 01 – Default
- 02 – Awaiting Cataloging
- 03 – Bindery Preparation
- 05 – In Cataloging
- 06 – In Process
- 08 – Lost in Process
- 12 – Route to Preservation

### Things to Consider

- Work orders are intended to replace process statuses or pseudo borrowers.
- Institutional work orders are really nice for scanning in and out of locations where they might stay for a while and/or where we want patrons to know they are in a process, such as in the preservation office.
- Local work orders are nice for functions where you are moving through multiple statuses and another department will be receiving and scanning those items individually.
- HOWEVER, there are NO batch processes for work orders, which means you must scan each book in and out of the work order. So, if you are planning to process things in and out quickly, frequently, and in large sets, I recommend using a temporary location instead. There are a lot of batch processes for locations and it is much, much easier than processing items in a work order.
- If you're asking Ex Libris to help you set one up, document your processes where you are currently using pseudo borrowers, process statuses, etc. and have that ready for Ex Libris. They will be able to help you decide what should be in a work order and what should not.
- An item can be scanned into a library level work order from *either* the library location *or* the work order department, BUT whichever one it is scanned to must be the one to receive it. So, if you scan it at the circ desk, it cannot be received from the acquisitions department, even though it is technically the same work order.
- Remember, if you put a lot of things into a work order, you will need to take them out individually, so make sure that's absolutely what you want to do before you start using them. We ended up writing scripts outside alma to create scan-in forms to allow for batch processing of work order items by Marking because we realized too late that we had created a pressure point there. So, technically, that *can* be done, but it is not ideal.

[Click here to view a PDF I made to illustrate how items move through work orders.](#)

[Report](#)