

Setting Up Work Orders

Administrators are able to add a work order type and work order department in Alma to manage processes done on physical resources. Operators of a desk or department that work with a work order type will be able to scan items in and out of the process, update the resource's handling status, and so forth.

In this how-to document, we will add a "Repair" work order type and department, to handle damaged physical items.

How to Set Up Work Orders

1. Create a new work order type:
 - a. To create a new work order type or edit a work order type that exists in Alma, go to: **Configuration > General > Work Orders and Departments > Work Order Types**.
 - b. Locate the work order type you want or click **Add Work Order Type** to create a new one.
 - c. Add a code, name, description (optional) and whether or not a work order request of this type will recall loans.
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Note

Out-of-the-Box, the work order type's name will be visible in Get It (this can be changed by editing the Get It labels, see [Configuring Display Items](#)).

+ Add Work Order Type ▾

Code *

repair

Name *

Repair

Description

Repairing damaged items

Recalls Loans

Add Work Order Type

Add Work Order Type

- If needed, add statuses to the work order type to enable operators to monitor the resource's handling. Select **Manage Statuses** (in the More actions list) and click **Add Status** in the *Work Order Type Statuses* screen.

The screenshot shows the 'Work Order Type Statuses' screen for the 'Repair' work order type. A table lists existing statuses:

Code	Name	Description
1 barcode	Barcode	Print new barcode
2 glue	Glue spine	Glue back torn spine
3 sort	Sort pages	Sort loose pages

An 'Add Status' dialog box is open, showing the following fields:

- Code *: cover
- Name *: Replace cover
- Description: Replacing torn book cover

The 'Add Status' button is visible at the bottom right of the dialog.

Manage/Add Status

- Decide who will handle these resources in Alma:

Note

When adding a work order type, a work order department is automatically created - the administrator can then change this setup if needed.

- a. If repairs are performed by a dedicated staff in its own department, you can create one or more work order departments for this work order type (see [step 4](#)).
 - b. If repairs are performed by the circulation staff at the desk, it can be added as a process to the circulation desk (see [step 5](#)).
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Note

It is also possible to set up both a dedicated department and circulation desk to handle repairs, in which case the library staff will be able to select who to send the resource to, depending on the amount or complexity of work required. To do this, perform step [4](#) and [5](#).

4. To add a dedicated department to handle the work order type, go to **Actions > Manage Departments**. You can add as many departments as required in your institution and/or libraries.
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Note

When adding a work order type, a work order department is automatically created - the administrator can then change this setup if needed.

Each department can handle a single work order type.

Work order departments can be added at the institution level or under a specific library depending on the **Configuring**: drop-down.

**Manage Departments**

- a. Enter the department information: Name, code, description, how long handling is expected to take and department printer.
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Note

Out-of-the-Box, the expected handling time will be visible in Get It (this can be changed by editing the Get It labels, see [Configuring Display Items](#)).

Department Details

- b. Enter one or more libraries served by the department. Departments added at the institution level will default to serving all libraries in the institution, but this is configurable.

Served Libraries

- c. Enter the department's contact information (optional).

Department Contact Information

- d. Add one or more operators that can handle the resources in the department.

Select Operators

- 5. To enable handling the work order type in a circulation desk, select the **library** from the “Configuring” drop-down.



- a. Go to **Configuration > Fulfillment > Library Management > Circulation Desks**.
- b. Edit the desk you want to add the work order type to, and navigate to the Work Order Types tab.
- c. Select the work order types you want to enable in the circulation desk and how long handling is expected to take for each. A desk can process several types of work orders.

Note

Out-of-the-Box, the expected handling time will be visible in Get It (this can be changed by editing the Get It labels, see [Configuring Display Items](#)).

Work order type	Work order time (days)
1 Technical Services	5
2 WRH Manuscript Digitization	1
3 Patron digitization request	1

Circulation Desk - Work Order Types

How Will Configuration Affect Daily Work Order Workflow

Staff can place a work order of type “Repair” on an item.

Requests: 1
Item ID: 228075
Home: 660009
MMS ID: 9910677700054

Repair Work Order

The staff member selects the work order type, the department to handle it (if there's more than one) and whether to place the item directly in the work order department (if the item is at hand) or trigger a pick-from-shelf workflow to get the item.

Place Item in Process

Process Type * Repair

Do not pick from shelf

Note

Managing Department * Major Repairs

Place Item in Process

We configured the Main Library's desk to handle items that require repairs and therefore, for Main Library items, staff can select it as the work order destination.

Digital libraries / edited by Fabrice Papy.
 Book By Papy, Fabrice. (London, UK : ISTE Ltd 2008.)
 Barcode: 3218
 Library: Main Library
 Creation Date: 2021/06/01 10:59
 Modification Date: 2021/06/01 10:59
 Expected Arrival Time: -
 On Hold Expiration Date: -
 Due Date: -
 Needed By: -
 Until: -
 Permanent Location: Stacks
 Other details

Call Number: ZA4080 .D53
 2308
 Call Number Type: Library of Congress classification
 Status: Item in place
 Due back: -
 Material Type: Book

Item ID: 23809400000009
 Holdings: 22794
 MMS ID: 99149133000054

Resource sharing request
 Work Order
 Withdraw
 Holdings
 Display in Discovery
 Items
 Inventory Debug Screen
 MMS Debug Screen

Work Order Destination

Place Item in Process

Digital libraries / edited by Fabrice Papy.
 Institution: Professional Services - HQ

Place Item in Process
 Process Type: Repair
 Do not pick from shelf:
 Note:
 Managing Department: look-up or select
 Circulation
 Major Repairs

Work Order Destination

The work order operator can use the configured statuses to keep track of what needs to be done with a specific resource or move items between internal processes by changing the status.

In Process Items

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

Process Status: All | Request Filter: All | Library: All

Title	Barcode	Status	Date received for department	End of Activity	Modified By	Modifi Date	Requests	Note	Library
Arguably : essays by Christopher Hitchens / Christopher Hitchens.	16802995	Replace cover	02-Aug-2021	12-Aug-2021	ex_lmpl	02-Aug-2021	No requests		Main Library

Work Order Status

In Alma staff search, staff will be able to see the work order name, status code, handling department name and expected handling date.

Arguably : essays by Christopher Hitchens / Christopher Hitchens.
 Book By Hitchens, Christopher. (New York, NY : Twelve, 2011.)
 Barcode: 16802995
 Library: Main Library
 Creation Date: 17-Dec-2011 3:42 PM
 Modification Date: 02-Aug-2021 5:28 AM
 Process type: Repair (cover)
 Expected Arrival Time: -
 At: Major Repairs
 On Hold Expiration Date: -
 Due Date: -
 Needed By: -
 Until: 12-Aug-2021

Call Number: PN4874.H52 A5 2011
 Call Number Type: Library of Congress classification
 Status: Item not in place
 Due back: -
 Material Type: Book

Requests: 1
 Item ID: 235428230000541
 Holdings ID: 2222964988000561
 MMS ID: 991368890000541

Work Order Information

Out-of-the-Box, Get It labels will display to patrons that the item is in process including the work order type name and expected handling time.

In process of Repair until 12-Aug-2021
 Loanable#PN4874.H52 A5 2011

235428230000541 In process of Repair until 12-Aug-2021
 Material Type: Book
 Location: Main Library New Books Display
 PN4874.H52 A5 2011
 Barcode: 16802995

Get It Label