

Processing Work Orders

Documentation by Kyle McCafferty, University of Illinois – Urbana-Champaign

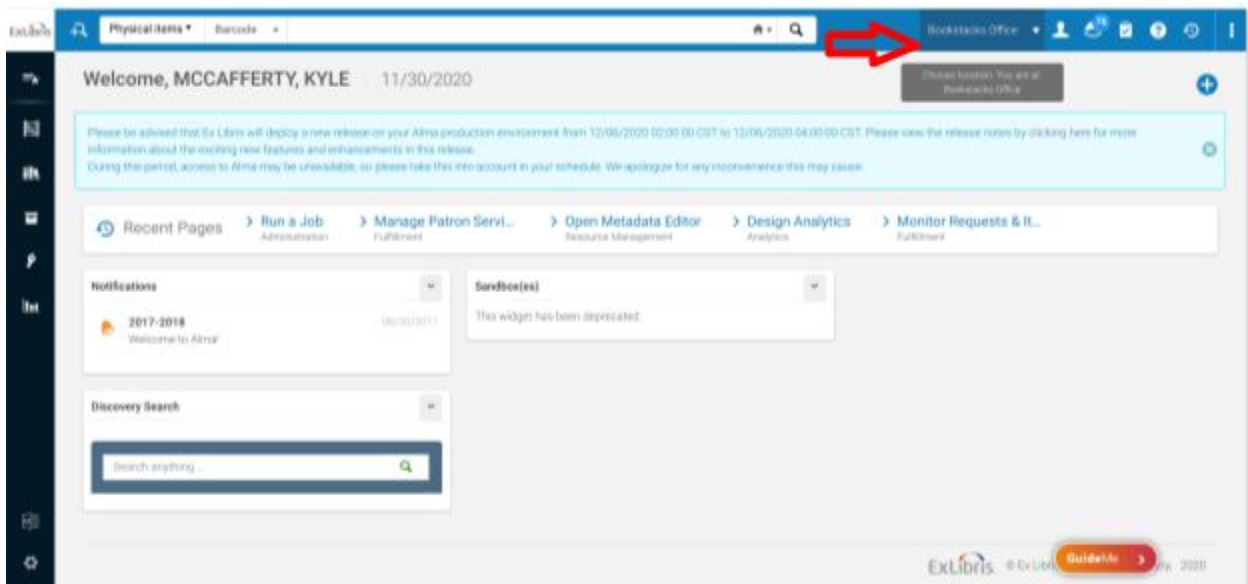
Table of Contents

Processing Work Orders - Getting Started	2
Resource Request Monitoring - Keeping Track	5
Work Order is Done	6
Troubleshooting Techniques	7
Fixing an Accidental Work Order	7

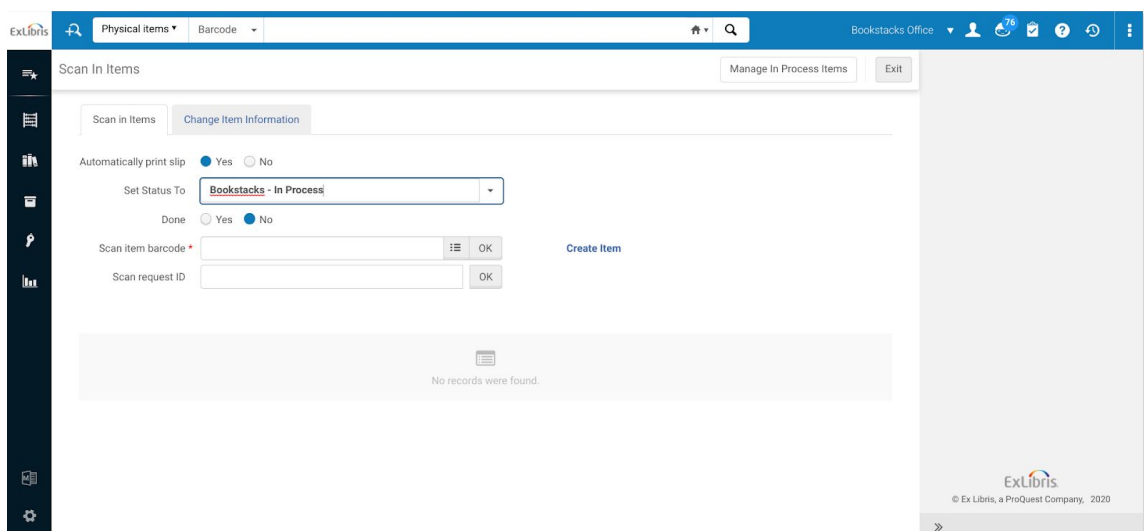
Processing Work Orders - Getting Started

In this document we will run through the steps of processing a work order on an item that a work order department has received.

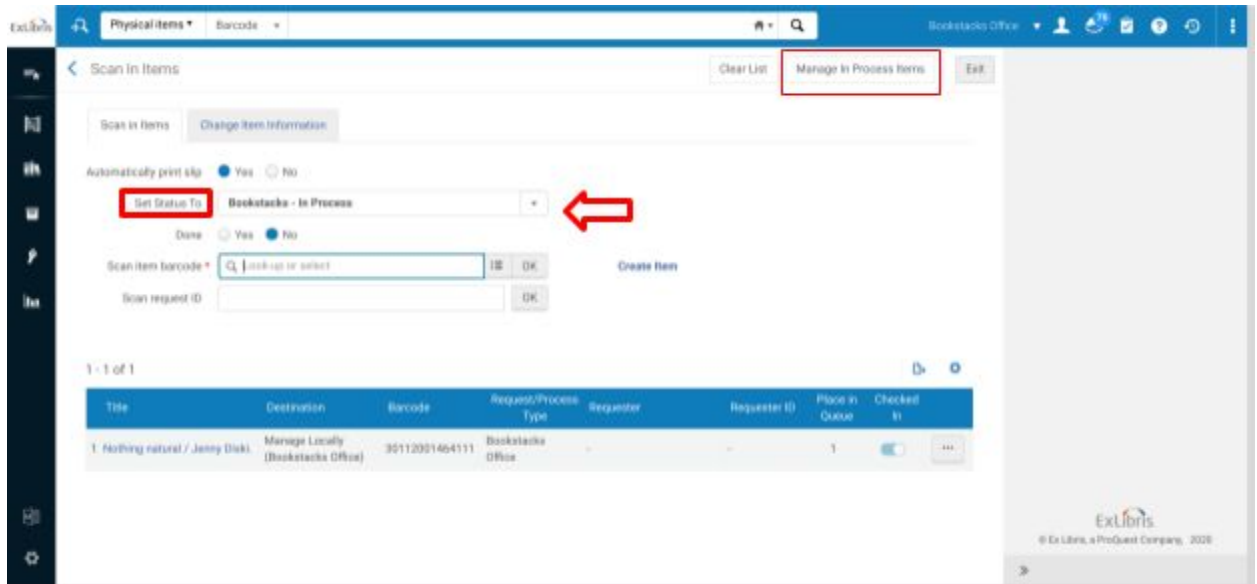
- 1.) Set your location to the work order department you are managing the item through:



- 2.) Navigate to the scan in items menu. Depending on your roles in Alma, you can find this in the Acquisitions and/or Fulfillment menu. Both options will take you to the same page.



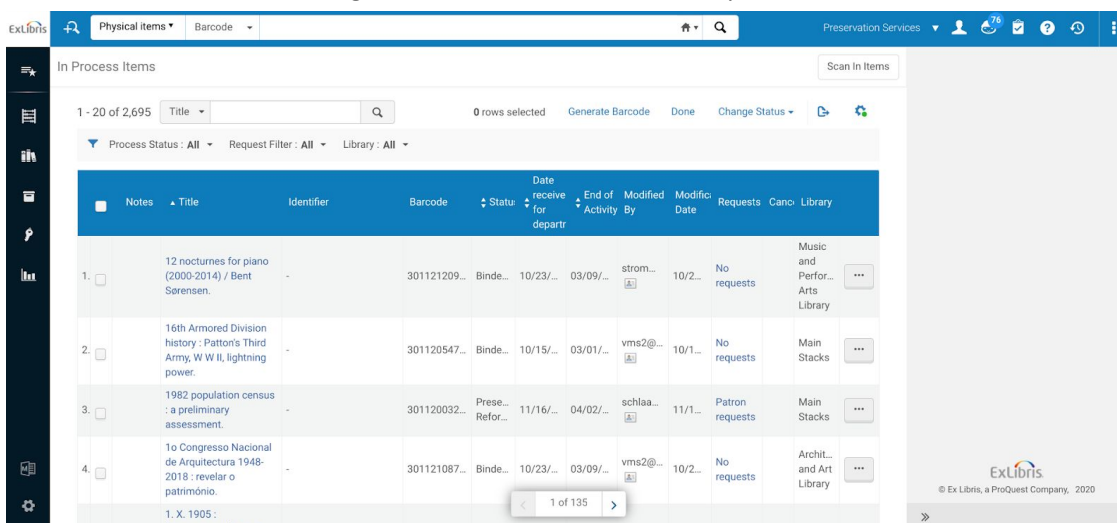
- On the scan in items menu, set the item status appropriately in the drop down menu, and scan the barcode into the “scan item barcode” search bar. Note that you can set the item status to not having a status, this will be reflected on the physical item information in Alma. Hit OK. Make sure Done is set at No.



- The item is now scanned in for the work order, and can be managed through the work order department.

To view or manage in process materials, you can click on the Manage In Process Items button within the scan in items screen. It can also be found through the Fulfillment menu under Resource Requests.

You can search for items using the search bar found at the top of the screen.



Note that you can customize which fields display on this screen, and you can also toggle the order in which they appear by various fields such as Status.

The radio button on the left allows you to change the status on multiple items at once, or mark them as done. However, the list will only display up to 20 items at a time. Items can also be marked as done through the scan in screen which will be covered below.

Resource Request Monitoring - Keeping Track

In the fulfillment menu under Resource Requests, you can find **Monitor Requests & Item Processes**.

You can monitor work orders through the various facets found here. Here are the ones we've found to be the most useful for work orders:

Request/Process Type: displays the requests for different work order departments

Workflow Step Status: displays which step the item is at within the work order department

Owning Library: limit the search based on the owning library's material

Important Note on the Cancel Button: All items in the resource request monitoring have the cancel button on the item line. Once the item has left your hands, do NOT click on cancel. All items that have been scanned in for the work order department need to be marked as **Done**. Even if the item request for the work order is cancelled, it will still display in the "manage in process items" list for the work order department. The only way it leaves that list is once the work order department has marked it as done. The **only time** you would hit cancel is if the item is in hand, and has **not** been sent out. If an item comes back to you with the work order request still on it, contact the work order department to mark it as done.

The screenshot shows the ExLibris interface for Resource Request Monitoring. The top navigation bar includes 'Requests', 'Requester', and a search icon. The main content area displays a list of three requests, each with a 'Cancel' button and a 'Print Slip' button. The first request is 'The sun shines over the Sangkan River / Ding Ling.' with details: Request Type: Preservation Services, ID: 8714688140005899, Call Number: 895.1 T493S, Request Date: 06/29/2020, Pickup Location: Preservation Services, Barcode: 30112000569480, Material Type: Book, Workflow Step: In Process, Process Status: Bindery, Managed By Department: Preservation Services, Process Date: 09/29/2020, Expiration Date: 02/14/2048. The second request is 'In search of paradise : great gardens of the world / Penelope Hobhouse.' with details: Request Type: Preservation Services, ID: 8835383780005899, Call Number: Q. 712.6 H653gr, Request Date: 07/01/2020, Pickup Location: Preservation Services, Barcode: 30112078543607, Material Type: Book, Workflow Step: In Process, Process Status: Conservation, Managed By Department: Preservation Services, Process Date: 09/04/2020, Expiration Date: 01/20/2048. The third request is 'The good companions / by J.B. Priestley.' with details: Request Type: Preservation Services, ID: 8863120010005899, Call Number: 823 P933G1929, Request Date: 07/02/2020, Pickup Location: Preservation Services, Barcode: 30112126328415, Material Type: Book, Workflow Step: In Process, Process Status: Collections Care, Managed By Department: Preservation Services, Process Date: 07/02/2020, Expiration Date: 11/17/2047. A 'Facets' sidebar on the left lists various filters like Type, Material Type, Workflow Step, Request Date, Date Needed By, and Workflow Step Status. A 'GuideMe' button is visible in the bottom right corner.

Work Order is Done

When the work on the item in the department is complete and the item is ready for its next destination:

1. Navigate to **Scan In Items**, which can be found in the fulfillment or acquisitions menu
2. Ignore the **Set Status To** line
3. Make sure the radio button next to **Done** is set to **Yes** (if you are scanning a batch of items that are done, you only need to click this once.)
4. Scan in barcode
5. Click Ok or press the Enter key

The screenshot shows the 'Scan In Items' interface in the ExLibris system. The top navigation bar includes 'Physical Items' and 'MMS ID'. The main content area has two tabs: 'Scan in Items' (active) and 'Change Item Information'. Below the tabs, there are several form elements: 'Automatically print slip' with radio buttons for 'Yes' (selected) and 'No'; 'Set Status To' with a dropdown menu set to 'Bookstacks - In Process'; 'Done' with radio buttons for 'Yes' (selected) and 'No'; 'Scan item barcode' with a text input field containing '30112001464111' and an 'OK' button; and 'Scan request ID' with an empty text input field and an 'OK' button. A 'Create Item' button is also present. Below the form, a message states 'No records were found.' The footer of the interface includes the ExLibris logo and copyright information: '© Ex Libris, a ProQuest Company. 2020'.

The item will now be put In Transit. Depending on the next step for the item it will remain that way until it is scanned in by either the Circ Desk of the owning library, or scanned in by a different work order department.

Troubleshooting Techniques

Fixing an Accidental Work Order

A work order has been created by accident, do the following:

If the item is in hand and you are the owning library or work order department:

- 1.) Navigate to the **Monitor Requests and Item Processes** list and **Cancel** the work order/request
- 2.) Go to the Scan In Items page
- 3.) Scan barcode in the scan item barcode field
- 4.) Item should display the next step as Reshelve

If the item has arrived In Transit from another library or work order department:

1. Item has arrived and is in hand
2. If you are a work order department (most likely the case with an accidental work order), simply mark the work order as Done
3. Scan in the item to change the status to In Transit and send item back to owning Library
4. Owning Library will still need to scan in item once it arrives to remove the In Transit status

If you are in a work order department and have *prematurely marked an item as Done*, simply navigate back to the scan in items page, make sure you have your location set correctly, and scan in the item with the appropriate status. Make sure that the radio button next to Done is checked No. In this case, you do not need to create a new work order on the item.

Sources:

<https://exlibris.libguides.com/alma/resources>

<https://wiki.harvard.edu/confluence/display/LibraryStaffDoc/Work+Orders>